SPO 305 HIePRO Approver Training Transcript

Powerpoint Presentation

Approver Training SPO 305 (Slide 1)

Welcome to the online Approver training for HIePRO the State's eProcurement application.

SPO 305 is the training for government personnel who will be approving solicitations and addenda or award notices and amendments in HIePRO.

What will be Covered (Slide 2)

First, we'll cover resources and required training, some definitions, and a little about the HIePRO application. Then we'll cover the Approver role and responsibilities. To put it all in perspective, we'll briefly review the other roles in HIePRO so you have a good idea of how everything and everyone fits in the system. It will make it easier to work together and more efficiently when you know what everyone is supposed to do.

We'll look briefly at commodity codes so it will be easier for you determine if the buyer has selected the correct codes.

We'll cover the two-step process to get access to HIePRO and finally, we will walk through the process of approving or disapproving a solicitation and award.

Note that if you are an approver for a solicitation, you will also be an approver for any addenda for that solicitation. Likewise, if you are an approver for a notice of award, you will also be an approver for any amendments to the notice of award/contract amendments.

Resources and Training Materials (Slide 3)

There are three main documents:

The HIePRO Program Manual, provides information such as the all the roles and responsibilities, and definitions. Read it first, before doing anything on HIePRO.

The HIePRO Approver Quick Reference has the step by step directions with screenshots of procedures for approving or disapproving a solicitation in HIePRO. Keep it handy when review a solicitation.

The Training Reference contains the Powerpoint slides used in this training.

You can find them on the SPO site by selecting HIePRO from the Header Menu of any SPO webpage. Scroll to HIePRO for State & County Personnel. They are also in the training section of the SPO website.

This Webinar is Designed for: (4)

This training is designed specifically for the personnel who will have the approver role on HIePRO. With the exception of eAdministrators, SPO does not require that the other

roles take this workshop and it is not designed for them. However, some departments may require certain staff take this training.

This Webinar is intended to (5)

Notice that this training doesn't teach you about the method of procurement. HIePRO is NOT a method of procurement. It is a tool to help departments conduct a solicitation in a more transparent and efficient way.

Definitions (6)

Just a couple of definitions so we know we are all talking about the same thing on HIePRO. There are more definitions in the HIePRO Program Manual.

In different places you may see Dept. eAdministrator/ eAdministrator / Dept. Administrator – they are all referring to the same role, that is ,the Department or CPO Jurisdiction eProcurement Administrator or their alternates.

The listing of eAdministrators is on the SPO website.

Definitions Continued (7)

For the Purposes of HIePRO:

RFQ is the small purchase method of procurement pursuant to HRS 103D-305

IFB also known as the invitation for bid, is the competitive sealed bidding method of procurement pursuant to HRS 103D-302

There are additional definitions in the HIePRO Program Manual.

About HIePRO (8)

We Pronounce it [hi-pro] no e

Solicitation notices & awards- posted to a public site automatically. (with the exception to of small purchase request for quotes in which the buyer has chosen to select the option of limiting to Hawaii only vendors)

HIePRO has Pre-bid (pre-offer) conference notice, Q&A section,

Addenda are issued on HIePRO.

Offers must be submitted on HIePRO. (Cannot accept them if vendors mail/email them)

There are 2 HIePRO sites (9)

HIePRO has 2 sites

One where you enter your solicitations – the production site.

And one where buyers can practice entering solicitations. – the training site.

They are two entirely different sites and there is a separate registration process for each.

Training site (10)

Here is what you need to do if you would like access to the training site.

Approver responsibilities (11)

You have 4 basic responsibilities in HIePRO:

Maintain the security of HIePRO.

Ensure procurement is conducted pursuant to the statutes, administrative rules and procurement procedures for the particular method of procurement.

Ensure the buyer has included clear written specifications minimum qualifications if applicable and any administrative requirements.

Adhere to the procurement code of ethics.

Maintaining Security (12)

HIePRO accounts may NOT be 'shared'. Your name is on the account and its use is your responsibility. Do not 'lend' your account.

Maintain security of your account. Your login is your email which means your password is even more important and you must protect your password. Don't do things like post your password on your computer monitor. Note that you will be prompted to change it every 3 months.

Data in HIePRO must also be kept secure.

Log out of HIePRO when you step away from your computer.

Procurement data is also subject to requirements for open information. (FOIA) Make sure you know when information must be kept confidential and when it must be released. It helps to know what is on the public site.

Follow Procurement Procedures (13)

The statutes, Admin Rules and Procurement Circulars are they are there for your protection.

And you have to do more than just attend the webinars. Procurement rules change. You are not required to take training over and over (but you can). You are responsible for staying up to date.

You can do that By checking the website each time you approve. Go to the Procurement Circulars, sort them by date with the most recent first; especially a few weeks after legislature adjourns.

Check the manuals and training handouts for updates. Check the webpages on the method of procurement being utilized.

Remember also, what is being purchased may also be subject to statutes/admin rules that are not part of the procurement statutes/rules. An example is the apprenticeship program and construction.

Ethical Procurement (14)

Conducting an ethical procurement is critical. It reflects not only on you but on every one who purchases for the state.

There needs to be no conflict of interest or even appearance of conflict.

When you have access to HIePRO as an approver you have access to information about every vendor in HIePRO. You must be an employee of the State through the personnel process. You cannot be hired through the contracting process because that makes you a vendor. It would not be fair for one vendor to have access to other vendors information. HIePRO buyers may not be a vendor to the state- even if it is for something entirely different than what you do or for another department.

Approvers in HIePRO (15)

There is no separate "approver" title in HIePRO. Approvers are buyers who are placed in an approval path. Many approvers are more experienced procurement personnel who not only procure but oversee others who are less experienced in procurement.

As an approver, you will the same access to HIePRO as a buyer. Just remember, if you only have delegation as an approver, you should not conduct a solicitation on HIePRO.

Other Roles and Responsibilities (16)

The eAdministrator Has the primary responsibility to oversee HIePRO for the department (or CPO Jurisdiction). They ensure security, control who has access, make sure it is used properly, and are the point-of-contact for department buyers and approvers.

The **system** administrator oversees HIePRO for the State and serves as the point-of-contact with the departments and CPO jurisdictions and with the vendor administering HIePRO, Hawaii Information Consortium, LLC (HIC), the vendor for our State portal.

Other HIePRO Roles and Responsibilities (17)

Buyer – of course, conducts the solicitation, in accordance with Statutes, Administrative rules, Procurement Circulars and other policies and procedures using good procurement practices. This is a big responsibility and not to be taken lightly.

Requester- this is a new optional role to help centralize procurement functions. Not many departments are using this role yet.

Non-procurement personnel who are the experts in the goods/services to be purchased enter the specifications and other requirements, a buyer picks up the request and finalizes it and issues the solicitation.

About NIGP Commodity Codes (18)

We user Commodity codes to connect vendors with appropriate solicitations. We use the NIGP commodity codes which are proprietary.

Codes are also used to conduct analyses of where our expenditures are.

The codes we use were developed by the National Institute of Governmental Purchasing now called the Public Procurement Institute and it is proprietary.

We use the 5 digit version

The first 3 digits are the class. There are over 300 classes.

The second 2 digits are the goods/service/construction and there are over 7,000. You probably don't want to print out all the codes.

Numbering is somewhat alphabetical.

Classes up to 899 – are for goods, that is, stuff.

Classes beginning with 900 and above are for services, including construction.

Common Commodity Codes (19)

As an illustration here are some of the most commonly used commodity codes

Class 071 – Automobiles, Sch. Buses, SUVs and Vans

O7180- SUV type vehicles

07190- Vans, cargo

91039- janitorial/custodial services

91027- garbage, trash removal

91036- heating, air conditioning maintenance & repair

Commodity Codes are Not Procurement Methods (20)

Note that commodity codes are not methods of procurement. Nor are they specifications.

We use commodity codes primarily to link the right vendors with the right procurements. There are some commodity codes labeled professional services. Just remember that this is just an NIGP description and is NOT the same as the professional services method of procurement. At this time, professional services method of procurement is not conducted on HIePRO.

Obtaining a HIePRO Account (21)

Obtaining a HIePRO account is a two-step process.

The first step is - You must have an eHawaii.gov account (some of you may already have one);

The second step is your eAdministrator grants you access once they obtain **certain information**

SPO has some forms departments may use for requesting accounts but we have several forms so it may be done a number of different ways and departments tend to take the forms and tweak them so save yourself some time and effort by checking on your departments' procedure before doing anything.

Creating an eHawaii.gov account (22)

Here is the how-to for creating an eHawaii.gov account. The procedure is also in the Approver Quick Reference and on the HIePRO site.

Getting Access/Permission to use HIePRO (23)

This is a description of the information you will need to submit to your eAdministrator. You MUST check with your eAdministrator for forms and procedures.

About Approvals and Approvers (24)

Approvals are not mandatory in HIePRO. It is the decision of each department. Approvals are a good check and balance for HIePRO. SPO uses them for that purpose. Do NOT set yourself up as your own approver.

Approval paths must be created and assigned in advance in HIePRO and can be for solicitations and addenda or awards and award or contract amendments.

Approval paths can have several approvers. They are always consecutive. If the first approver in the path does not approve, there is no way for the second approver to approve. Subsequent approvers do not have access until the preceding approver, approves.

 Your eAdministrator needs to create the approval path and most of the time they are not psychic. They do not know unless someone tells them. If you should be an approver in an approval path in HIePRO, be sure to check with your eAdministrator for your departmental process. There are forms on the SPO website in the HIePRO section. The devil is in the details. These are optional forms for department use and departments tend to tweak them when using them.

If your delegation is for approval only (25)

If on your SPO-036 your delegation is only as an approver, that means you do not have delegated authority to procure on HIePRO even though you have the access. So don't procure!

Approval Path Requirements (26)

Approval paths have to be assigned to a function, either solicitation or award. They also have to be assigned to a method of procurement.

All addenda will flow through the same path as a solicitation. All award/contract amendments will flow through the same path as an award.

Approval Path Options (27)

An approval path can be assigned an amount range instead of applying to all solicitations or awards. As an example, a department may set up an approval path for solicitations estimated at $100,000 or less go through one approval path, and solicitations of $100,000 to 2 million dollars to go through another approval path.

The amount range is only for determining which or whether it will go through an approval path. It does not limit a buyer from issuing a solicitation for an amount over a path range amount.

Lastly, approvals are fine and wonderful but if they are not assigned to a buyer, nothing will go on the approval path.

Back-Up Approvers (28)

You may have a back-up approver if you go on vacation or on a trip.

Your eAdministrator has to assign your back up and it is done by each approval path so be sure to give your eAdministrator all the approval paths you are on.

For instance, Stan could be your back-up for your solicitation approval path and Shawn could be your back up for your awards approval path.

How to Utilize the Back-Up Approver Function (29)

Here is how to utilize back-up approvers if you have them.

When you are going to be out of the office, select the **I am out of the Office** Button from your Dashboard.

All approvals that come to you will be routed to your back-up for approval.

When you return, log in and select I have returned to the Office.

Future approvals will now be routed to you for approval.

Approving a Solicitation (30)

The mechanics of approving /disapproving is very simple 4 steps.

Log in. All items awaiting your approval will be on the dashboard.

Select the solicitation/award awaiting your approval, review it by selecting each tab.

At the bottom of all the pages are approve and reject buttons.

If you reject a solicitation/award, you will need to enter a reason so the buyer knows what to do.

Fairly simple and straightforward. Again, the devil is in the details.

Common Issues/Items to Review (31)

Make sure the solicitation and line item titles make sense and are descriptive.

The solicitation title is what vendors search on and what they see when they receive the notice.

The descriptions can include the specifications if they are short enough.

If specifications are in an attachment, the description field should have a short description and reference the attachment.

In Summary (32)

HIePRO is not artificial intelligence. It is just a computer program. Just because you **can** do something in HIePRO doesn't mean it is okay or a good thing to do.

HIePRO doesn't know what to buy. The buyer has to provide all the specifications. If what is needed is not specifically described, it is hard to tell what you will get.

Even though you may be approving because you are someone's supervisor or you are told you are approving just to make sure the funds are there, HIePRO records your approval as an approval of the entire solicitation or award.

While it doesn't show to the public, it is kept and subject to the Open Information act.

Questions? (33)

Look at the training resources and FAQs on the SPO website

If you still have questions, contact your eAdministrator .

Demonstrating HIePRO

HIePRO Landing Page (Home)

So this is HIePRO. We are on the production site where you will be conducting your reviews and approvals or disapprovals. At the top of the page is an area with a black background. Toward the right, you will see help chat. Selecting this link connects to a chat with Hawaii Information Consortium, (HIC) the vendor providing the HIePRO application. This link is primarily for vendors. It is manned by HIC staff. They know about the application. They do not know about procurement.

You can use it if you are having problems logging in; or if there is a problem with the application itself, for instance if a window doesn't open. Do not use help chat for questions about commodity codes, the unit of measure or any procurement-related questions. Contact your eAdministrator if the answer is not in the training references.

Below the black area on the right is a cellphone, laptop and tablet icons; it just means this application is mobile friendly. Below that you'll see a green or teal header. On the left is Home -that is this page, the HIePRO landing page.

Commodity Codes

Next to that is Commodity codes. This is where you view commodity codes by class. When you select it, a list of over 300 classes appears.

Notice that they are alphabetical and all goods (or stuff) until you get to class 898, X-ray. Classes 900 and above are services including construction. Each class is a link. When you select the class name, all the codes in that class appear.

Public Search

Moving to the right on the green header, you will see Public Search. Select this and you will be able to search solicitations that are open to all vendors on HIePRO.

Note that I didn't say all solicitations. This application allows buyers to limit small purchase method of procurement solicitations to Hawaii-only vendors. If the buyer chooses this option, vendors registered in HIePRO who have not entered a Hawaii address cannot even see the solicitation.

Small Purchase solicitations for which the buyer has chosen the Hawaii vendors -only option will NOT appear on the public site. It would cause a great deal of confusion. Non Hawaii vendors would see the Hawaii-only solicitations on the public site, then log in and not be able to find them. This Hawaii Vendors only option is available for small purchase request for quotes (RFQs) NOT competitive sealed bids (IFBs) or competitive sealed proposals (RFPs). If you want the solicitation to be on the public site, don't allow the option to limit it to Hawaii-only vendors.

If you want to view all solicitations, select the search button without choosing any parameters. To view the details of a solicitation, select the solicitation number. Information about the solicitation is on 3 tabs on the public search

The General Information tab is the default view.

On this tab you will see: the department and division issuing the solicitation, offer due date, solicitation description, contacts and attachments that apply to all line items. The next tab is the line item tab and contains details about the line items. After selecting the line item tab, you will see a listing of the line items. To see the details of each line item, select the line item number. The third and final tab on the public site is the instructions for the solicitation. There is no place for a vendor to respond to the solicitation on the public site. Vendors must log in to respond.

On the public search, there are 2 tabs. The second tab is for searching awards.

You can search all Awards in HIePRO. Like solicitations, you can select search button to view all. To view a contract award, select the award number.

Note that the solicitation number is a link to the solicitation.

One more thing about getting around in HIePRO.

Wherever there is a listing you will find 2 buttons.

The button with the diagonal arrows allows you to control the number of records, in this case, awards, that appear on the screen. By selecting the button and the dropdown arrow you can view just 10, more or all records in a single window.

The other button, that looks like a bulleted list allows you to control which columns appear.

The next item on the green header points to FAQs on HIePRO. This includes questions from all users and is another reference resource.

The very last item in this header menu is the Vendor Registration button. This is where you will direct vendors to register if they're not already in HIePRO.

Get back to the landing page by selecting Home.

Moving further down just above the login button is the **Learn more about HIePRO** link. Selecting this, and scrolling about halfway down the page will take you to **HIePRO for State and County Agencies** training references & info.

Below **Learn more about HIePRO** is the **Log In** button where everyone who has access to HIePRO may log in. Next to the login button you will see the **Sign up** link. Select **Sign U**p to create an eHawaii.gov account (the first step in gaining access to HIePRO).

It is also a two-step process for vendors to gain access to HIePRO. The first step is the same as buyers – vendors must have an eHawaii.gov account. The second step is different. Buyers must get access from their eAdministrator; vendors have to select this Vendor Registration link and, on the next page, select the Log in and Register as a Vendor button.

Once you have completed the buyer 2 step process, when you log in with your eHawaii.gov account the home link will become the Home Dashboard link. On the right where you see Vendor registration you will see your login/email address. If you log in and see your email address on the right but the Home Dashboard doesn't appear, it means you have not been given access.

Creating an eHawaii.gov Account

Creating an eHawaii.gov account, that first step, is fairly simple and straightforward. Open each section, follow the instructions and complete the information.

When creating the password, click the little question icon above the field. It will tell you what you need as a minimum for a password. Remember the answer to the secret question. If you forget your password, you will need the answer to retrieve your password.

Skip the subscriber account section, it is for vendors.

Select the Agree to the terms of the agreement checkbox and select the create account button. Step one for gaining access to HIePRO is easy. Remember that step two is having your departmental eAdministrator give you access to HIePRO. eAdministrators are NOT automatically notified and you must provide them with information.

We will log in and review the dashboard. We'll do it on the training site so you can see what it looks like when an approver has some pending approvals. Before we leave the production site, Look at the background. Notice the pretty picture.

(HIePRO Training Site) The Dashboard

This is the training site.

It looks a lot like the production site with a few differences. Remember the picture that was in the background? The training site has no pretty picture. Should you want access to the training site it is an entirely separate site, and requires that you set up a separate account. More information on how to do this is in the approver training handout.

Now we'll log in and look at the dashboard.

Notice that the overall look is the same as the public site - but there are differences. In the header menu, it says **Home DASHBOARD** instead of just **Home**. The link to

Commodity codes is still there. Where it used to say **Public Search**, it now says **Search**. That's another clue you are logged in.

If you select **Search** and look at the tabs, you will see one more tab that was not on the public site, the vendor tab.

You may search for vendors by name or by commodity code. Enter a one word description, select the commodity code and look at all the vendors registered for that commodity code. Are they the vendors you would expect to see?

You can also search for a vendor by name. Enter the name or part of the name, select the vendor name & select the commodity code tab. Here you will see all the commodity codes the vendor registered for.

Back at the header, all the way to the right, where it said Vendor Registration on the public site, it now has your login, that is, your email address. Selecting the dropdown next to your login you will see two items: logout - and update your ehawaii.gov account. If you need to change your address, phone, name, email, password or secret question, this is where you do it. Only you have access to change this information in your eHawaii.gov account.

Now let's move down the dashboard. If you have anything requiring your approval, it will be here. You'll be able to just click and begin your review. Before we do that, we'll finish reviewing the dashboard.

Below that you will see several tiles.

On the left is View my profile and approval paths. Selecting it will show your name, email, phone and department.

At the bottom you will see the approval paths to which you are assigned as an approver.

Going back to the dashboard,

At the very bottom of the dashboard is an **'I am out of the office'** button. Selecting it will reroute all solicitations, addenda, awards or amendments entering the approval path to your back up or backups for each approval path you are in. This will only happen if your eAdministrator has set up your back-up or back-ups.

Make sure you have a back-up approver before selecting the '**I am out of office'** button. If you do not have a back-up approver, your approvals will not go to anyone.

Mechanics of Approving

Finally, we will cover how to approve or disapprove. First we will go over the mechanics. Then we'll look at it more closely. All items that are awaiting your approval are at the top of the page. Select the link under action column to begin your review.

First, we'll approve a solicitation waiting release. Don't blink because the mechanics of approving are simple. Remember, the devil is in the details. We'll look more closely at what you should be reviewing after the mechanics are demonstrated (the details).

There are several tabs in which the information has been entered and it is formatted in a manner very similar to the public site. Much of the information is in the first tab, General Information.

You can review the information on the General information tab, and move to the next tab, etc. You can also move back and forth between tabs should you need to compare information to make sure it is consistent. There are now a lot of tabs but you do not need to review them all. A number of them have no data to review at this point.

At the bottom of each page are approve and reject buttons, (the duplicate button is not for approvals, ignore it for now). The buttons are for the entire solicitation, not just the page. Once you have completed your review, select the appropriate button from the bottom of any page. To approve, simply select approve; you will get a confirmation message. If you need to reject, a text box will open in which you will enter the reason and tell the buyer what to do so that it can be approved. That's it. Sounds simple. If it were this simple, this training would be about 3 minutes long.

Approving a Solicitation

Now we'll take a look at the information you need to review: those devilish details.

We'll begin with the first tab General information. In the procurement method, make sure the buyer has selected the correct method. At the time this video was created, the only methods of procurement you should be using HIePRO is small purchase request for quotes (RFQ) and competitive sealed bidding (IFB). Make sure the buyer has not selected small purchase and then referred to the solicitation as an invitation for bid in the attachments or elsewhere in the solicitation. The procurement method has to be correct and language has to be consistent or it will have to be cancelled and re-issued.

Solicitation type- at this time should be either goods & services or construction. We are not using HIePRO for any other procurement type at this time.

Solicitation Title - The solicitation title should be descriptive of what is being purchased. The Solicitation title is different from the line item title, which we will see on the next tab. If the buyer is purchasing only one line item, you might see the same thing in this field as the line item title. If the solicitation is for more than one line item, the solicitation title may be different than line item titles. For instance, if the solicitation is for buying trucks and SUVs the solicitation title may be vehicles and the line item titles may be trucks and SUVs respectively. If the solicitation is only for a truck, both the solicitation and line item title might be Truck.

Likewise for the solicitation description. For instance, following the previous example you might see "2 trucks and an SUV." The detailed description or specifications should go in the line items tab.

Next you will see the significant dates.

Release Date and Offer Due date are first.

The release date changes if the approver does not approve it by the day the buyer schedules it for release. The other dates do NOT automatically change. Buyers may need to extend the offer due date and time. As an approver, you want to make sure there is sufficient time between the release and due date before you approve it. For a competitive sealed bid (IFB) the minimum time is 10 days between the date published and offer due date, so a minimum of 12 days. The average time buyers leave solicitations open on HIePRO is about 3 to 4 weeks.

Statutes and rules do not address times for small purchase request for quotes. The average time a small purchase request for quote is on HIePRO is about 2 to 3 weeks.

Pre-offer conference - If a pre-offer conference is being held the check the dates and information. The date is here, the additional information, like the location and any comments are further down in the Pre-offer conference section. If the date for the pre-offer conference is near or has passed by the time you are approving this, reject the solicitation so the buyer can reschedule the dates.

Show to HI Vendors Only - This option will only appear when small purchase request for quote is selected as the method of procurement. If yes is selected, the solicitation will only be visible to vendors registered in HIePRO with a Hawaii address. The solicitation will NOT appear on the public website as there is no way to know if someone is a Hawaii vendor until they have logged in. It would be confusing and misleading to have a solicitation on the public website and then have a non-Hawaii vendor log in and not be able to find it. This choice is only available for the small purchase request for quote method of procurement.

Allow for Submission of Questions - (Q & A) We recommend this option be utilized. Check the question answer due dates and times Note that a due time of 12:00 AM is 59 seconds after the beginning of the date listed, that is 59 seconds after midnight of the day before. Do not allow 12:00 AM as the due date.

If a pre-offer conference is held, it makes sense to have questions due after the conference date.

Contract Start Date - if this is a contract that will occur over time, the estimated date of the contract start date should be here and of course it must be after the award.

Delivery/End of Contract Date - If this contract occurs over time the end of the contract date will be here. If this is a one time delivery contract (for instance, for a part), the delivery date should be here - the contact start date should be blank.

Allowing vendors to submit by line item. Let's say this solicitation had 3 line items. If this is yes, then a vendor is able to submit an offer for one or two or all line items. If this answer to this in No, the vendor must enter a price for all line items before it will let a vendor submit an offer. Note that this will happen when line items are listed as separate line items in the HIePRO system and not in any attachments. HIePRO is not that smart that it can read your attachments.

Procurement officer for the solicitation. Ensure the correct Procurement Officer is entered. The procurement officer may be different for each solicitation depending on how the department chooses to assign procurement officers. The procurement officer is NOT the administrator of SPO. Reject the solicitation if the administrator of SPO is listed as the Procurement Officer. That is incorrect.

The next section contains the pre-offer conference information. Examples of buyer comments placed in the Pre-Offer comments field are:

• 	where to park,

• 	if an ID has to be presented at the door;

The next section contains the buyer and information Specifications contact information. A word of caution having someone other than the buyer as the specifications contact, if they are knowledgeable of the subject matter but not knowledgeable of procurement. Buyers have had to cancel several procurements because of the comments or actions made by specifications contacts to vendors, simply because the contacts were not familiar with procurement requirements. We recommend that the buyer serve as specifications contact and utilize the Q & A section. The buyer can then pass questions to the subject matter expert and review their answers before entering them in the Q & A section.

Attachments - Any attachments that apply to all line items should be here. Buyers may also upload the 103D General Conditions. Check attachments by opening them to ensure they are the correct ones. Although the system is not designed for it, note that when there is only one line item, the buyer may place the specifications attachments here. If there is only one line item, it does apply to all of them.

Scroll up and select the next tab to continue your review.

Line Items Tab - Each solicitation must have at least one line item. Check the commodity code and ensure it is correct. More than one commodity code may be selected when they are similar. To view the details of the line item, select the line item number

Quantity & Unit of Measure.

Quantity - At a minimum an estimated quantity must be entered. If it is estimated, the fact that it is an estimate and is not guaranteed must also be stated in the specifications.

Entering a guaranteed minimum that will be purchased may lead to better pricing in specifications.

Unit of measure - make sure the unit of measure makes sense for the goods or services being purchased. Most of the time it will one of the following

each when purchasing goods (stuff),.

job If a one-time service is being procured,

If it is a recurring service it may be a unit of time, such as a year, a month or an hour. You want to use industry standards whenever possible. Vendors are busy too, and may not read it correctly if something unusual is entered. You don't want to have to resolicit. The estimated price per unit remains hidden from vendors and the public unless the buyer selects the option to make it public.

Title & Description

Description - this is the line item title and description. If specifications are short enough they can be placed in the description field. If specifications will be in an attachment, a short description of the goods/ services & reference to the attachmt should be here in the description field.

Attachments

Make sure attachments are there, open them. Check to ensure they do not contain information that conflicts with other information in the solicitation. A common mistake is to have different dates in the attachment.

When you have reviewed all information on this tab move to the next tab, Instructions.

Instructions Tab - Make sure the instructions make sense & don't conflict. Most of them are standard and are mandatory, that is, they cannot be deleted. There are several standard optional instructions buyers may choose to include. Buyers may also create instructions. If your buyer creates an instruction, ensure the following:

- it belongs in instructions and not in the specifications;

- it makes sense; and

- there are no typos

Vendor Notification Tab

This function is used when the buyer knows a vendor is in HIePRO but has not included the commodity code in their commodity code profile. The buyer can add the vendor so the vendor is sent the email notification. You want to ensure the buyer is NOT being preferential in who they notify, that is, notifying one vendor and not another because that is the vendor they want.

You may review the remaining tabs as needed. Note that the protests tab is in development for future use and will be used for recording protests that are received. Protests are not filed through HIePRO at this time. When approving a solicitation there will be nothing in the questions & answers tab or the offers tab. The history tab contains a history of the solicitation.

When you are reviewing the solicitation you can flip back and forth among the tabs. The 'approve' and 'reject' buttons at the bottom of each page are there for your convenience and approve the whole solicitation and not just what is on that particular page.

When you are ready, select approve or reject from the bottom of the page. If you are rejecting, you must enter a reason so the buyer knows what to do.

Approving a Solicitation Addendum

The procedure for approving an addendum to a solicitation, award or award or contract amendment is similar.

When approving an addendum here are some things to check. Make sure the reason, located at the top of the page, makes sense. It must contain a summary of the change or changes.

Ensure the buyer has made the change in the solicitation. For instance, if the offer due date is changed, scroll down to the offer due date field in HIePRO and verify that it is also changed correctly. If any of the specifications are changed or deleted, make sure it is addressed in the solicitation where the specifications are, such as an attachment, and not just in the reason for the addendum. It can be confusing if it is not and could cause a protest.

If any dates are revised, check how they may affect other dates. For instance, if the buyer has changed the due date for answers to questions, is there sufficient time between the date the answers will be released and the date offers are due so that the vendors have enough time to review the answers and consider them in developing their pricing? After your review, select approve or reject.

Approving an Award

Now, we'll look at approving awards. The mechanics are similar. To review, there are several items you will want to check:

These are some things to check in the award itself.

Contract dates- Make sure they are NOT in the past, that is, prior to the award date. If it is, reject it and tell the buyer to adjust accordingly. If you allow it to pass, it will be a red flag should you be audited, not to mention confusing the awarded vendor.

If the quantity has been adjusted, ensure justification is included in the competition comments, general comments and internal comments.

If attachments have been added, select each and make sure they are correct. Buyers can attach the contract to be signed.

On the instructions tab, check the instructions. Do they make sense? Do they conflict with anything else in the award or solicitation?

If the buyer has not emailed you a copy of the abstract summary, you should review the offers. There are two ways to do that.

A quick way is to look at the Abstract Summary pdf file generated by HIePRO.

Scroll down to the bottom of the page and select the Abstract Summary button.

A second way is to look at the offers in HIePRO. To do that, go to the general information tab of the award.

Select the solicitation number. It is a link to the solicitation.

Once at the solicitation, select the Offers tab

You will see a listing of all vendors who made an offer and their total prices for all line items and total units.

If you want to look at prices by line item or the price per unit. To do that scroll down the page to the line item table

Select the line item number. You will see a description of the line item followed by the unit price and total price for each vendor who submitted an offer.

When you are done and ready to get back to the award, scroll back up to the listing of all the offers. Under the award column select view. It is a link to the award.

You are now back at the award. When you are ready, scroll down and select approve or reject. If you are rejecting, you must enter a reason so the buyer knows what to do.

Congratulations. You have completed SPO 305 HIePRO Approver Training. You may review it any time. Remember to fill out the certificate of completion & save a copy for your records before selecting the submit button. Your feedback is appreciated.