Introduction

A contract (CT) is a formal agreement established with a vendor to purchase services.

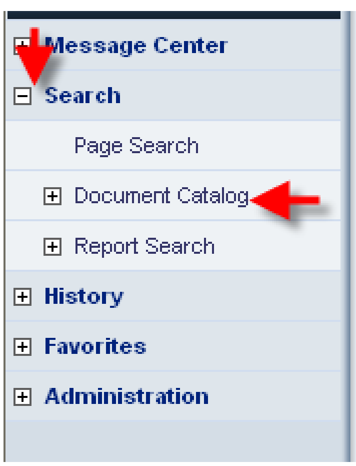
State of Maine Policy

A contract is a written agreement between a provider and the State of Maine describing the services to be performed, the terms and conditions agreed to by the parties, the cost of the services and how payment will be made. The principal purpose of a contract is to purchase, lease, or barter property or services for the direct benefit of the government. A contract is generally awarded to a provider if the provider is the winner in a competitive bidding process (RFP). However, a contract may be awarded if there is a valid sole source justification. The contract document will be an Agreement to Purchase Services (BP-54), which is a legally binding written agreement between the provider and the Department or if the contract is under $5,000 a BP18 contract document could be used instead.

Creating a CT document

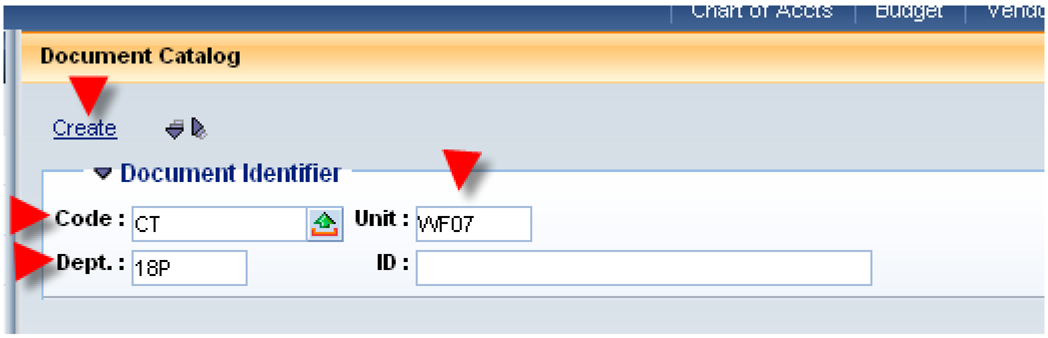
Creating a CT from the Document Catalog

From the secondary navigational panel at the left of your page click on Search, then Document Catalog

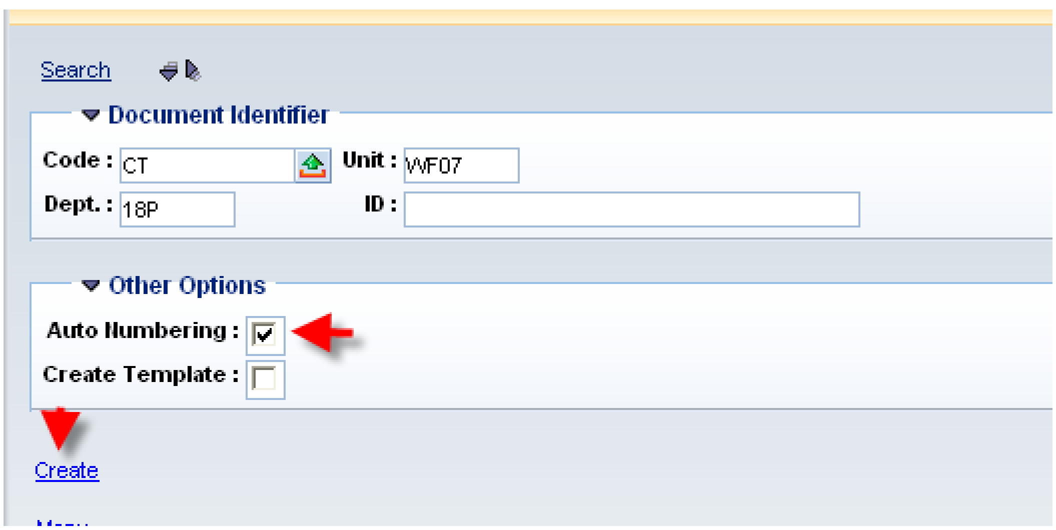


Under the Document Identifier section fill out the following fields:

- Code – you would enter in CT as you are doing a contract
- Dept.: - this will be your agency number, I am using 18P as that is my agency number
- Unit: This is your workflow unit number assoicated with your approver(s) – this unit will start with a WF* followed by two numbers. My workflow number is WF07 which you will see in the example below.
- Then click the Create link



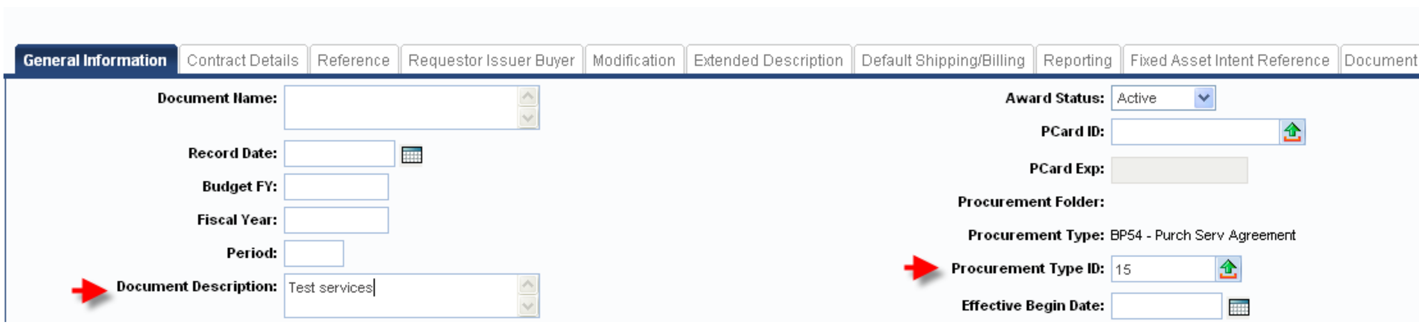
- Where all procurement documents need to be auto numbered check the Auto Numbering box and then click Create



Your CT will open at the General Information tab on the Header.

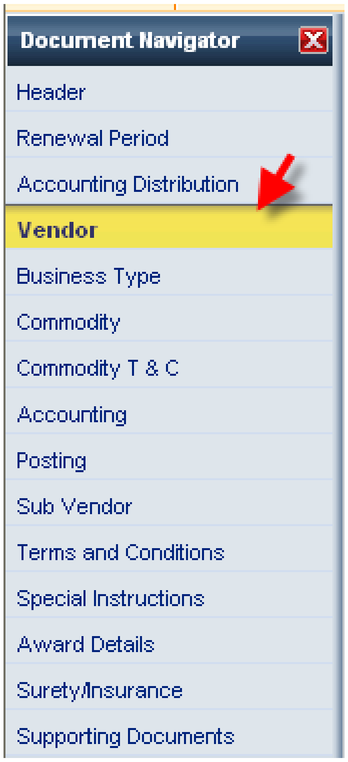
- Under the Document Description you can enter in what the service is for.
- On the right hand side under Procurement Type ID select the type of contract you are doing. Below are some samples of what you can select:

Procurement Type	Procurement Type Name	Description
12	BGS Construction/Misc.	BGS Construction/Misc.
13	DOT Construction/Misc.	DOT Construction/Misc.
14	BP18 - $5000 Contract	BP18 - $5000 Contract
15	BP54 - Purch Serv Agreement	BP54 - Purchased Services Agreement
17	Cooperative Agreement	Cooperative Agreement
18	Blanket Contract	Contracts for emergency situations that do not require a vendor.

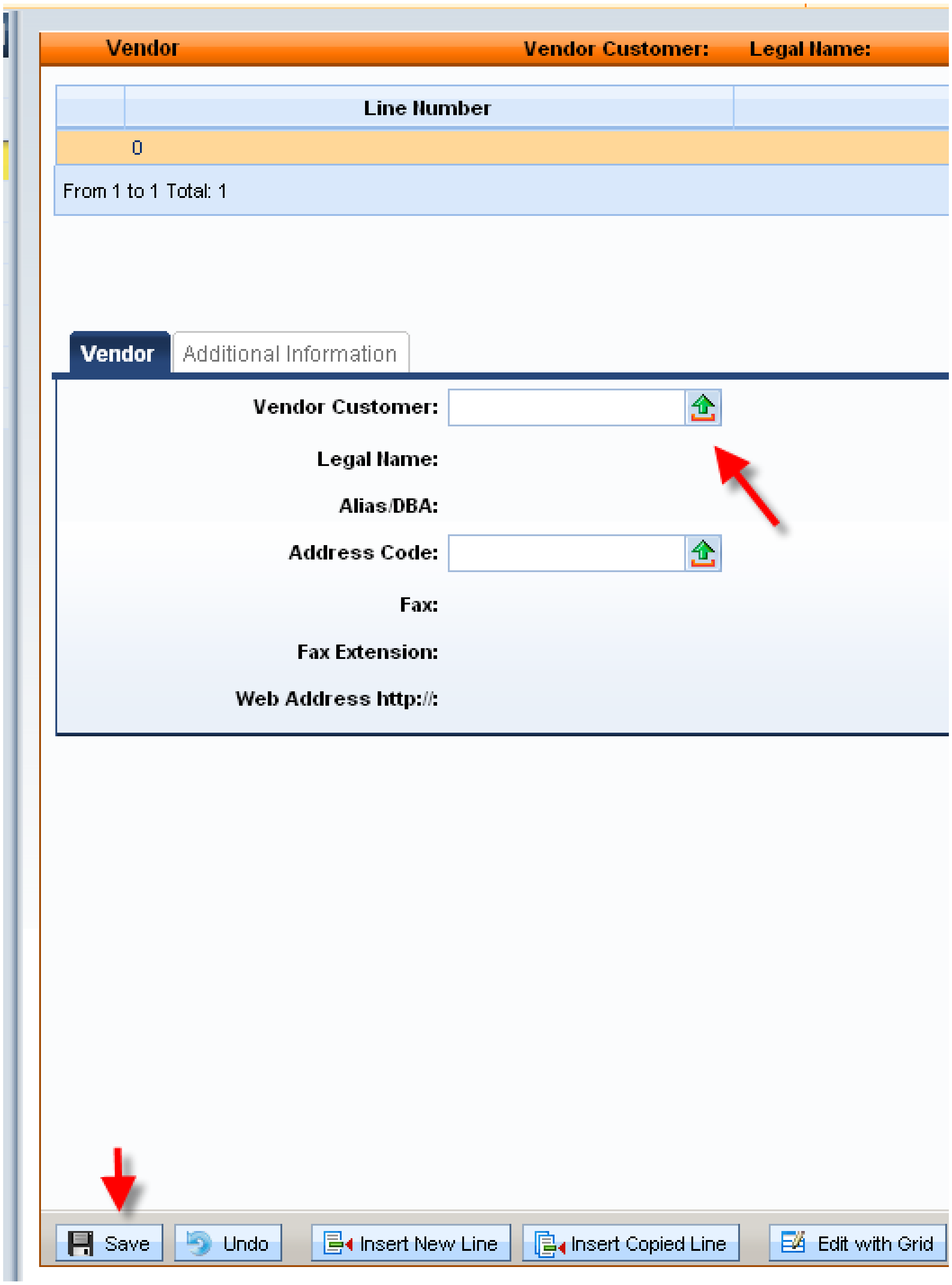


- Click on the Requestor Issuer Buyer tab and enter in your Requester ID which most often is the same as the Issuer ID and click save.

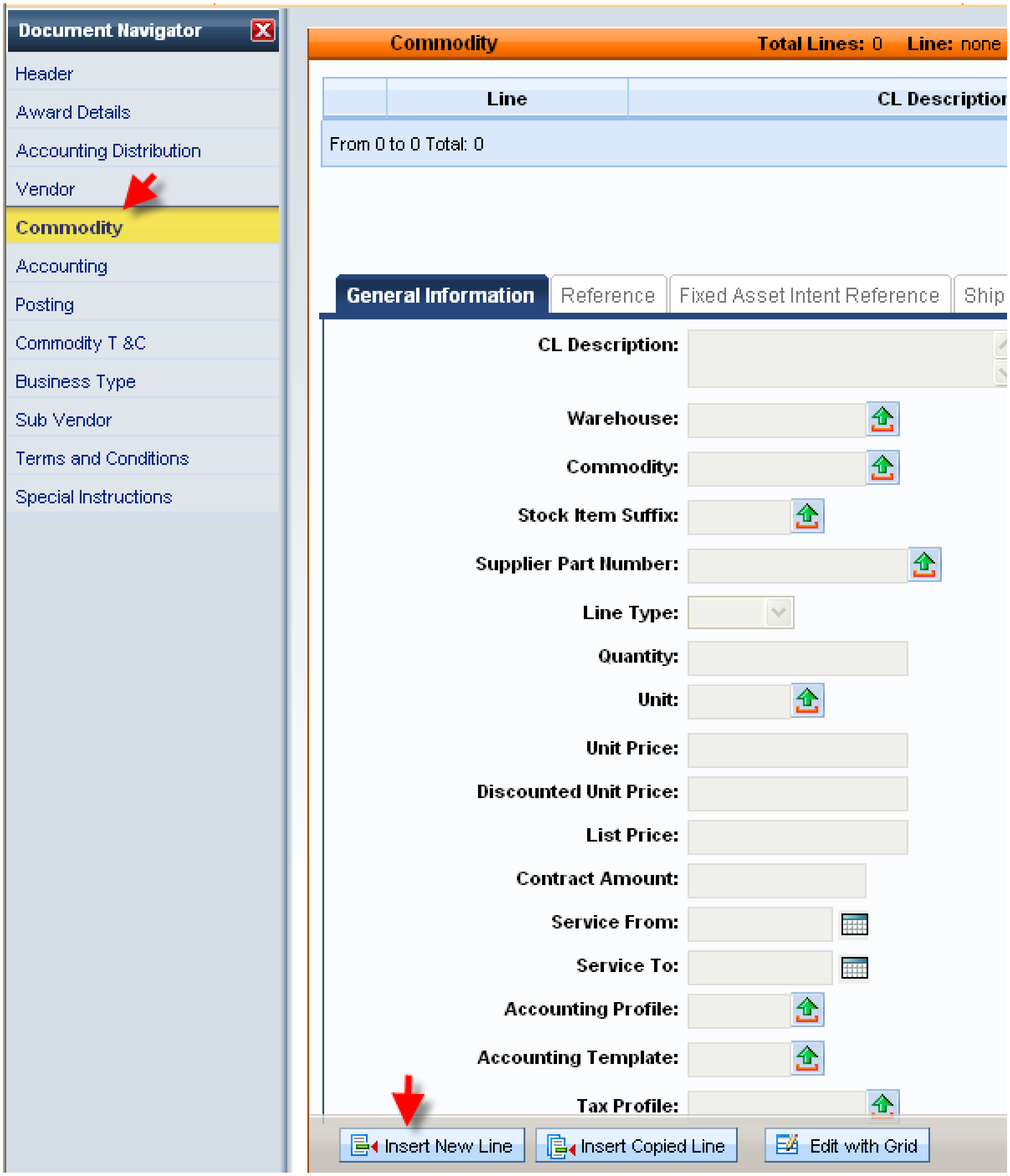
You will now need to put in the vendor. From the Document Navigator on the left hand side click on Vendor.



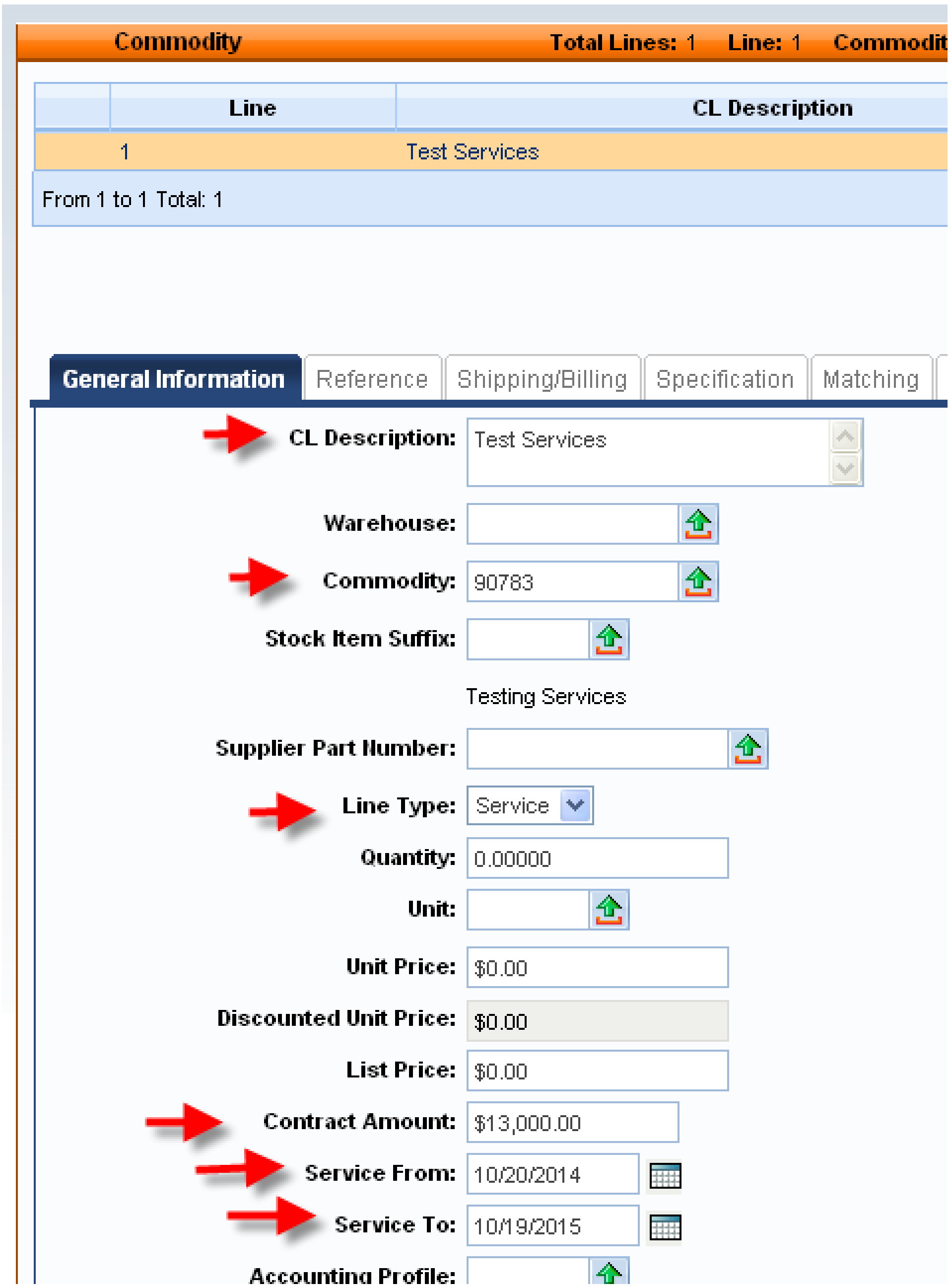
Enter in the Vendor Customer code or use the pick list to search for your vendor. Once inserted click on save.



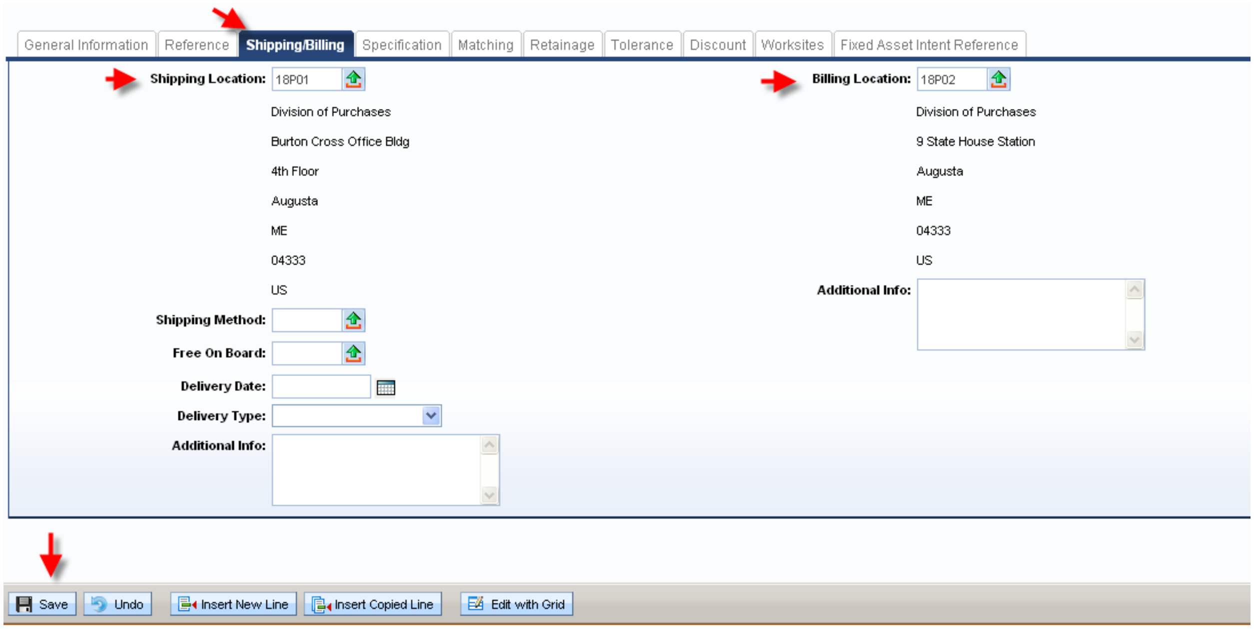
From the Document Navigator on the left hand side click on Commodity. You will notice that the fields are grayed out – you will have to scroll to the bottom to click on Insert New Line:



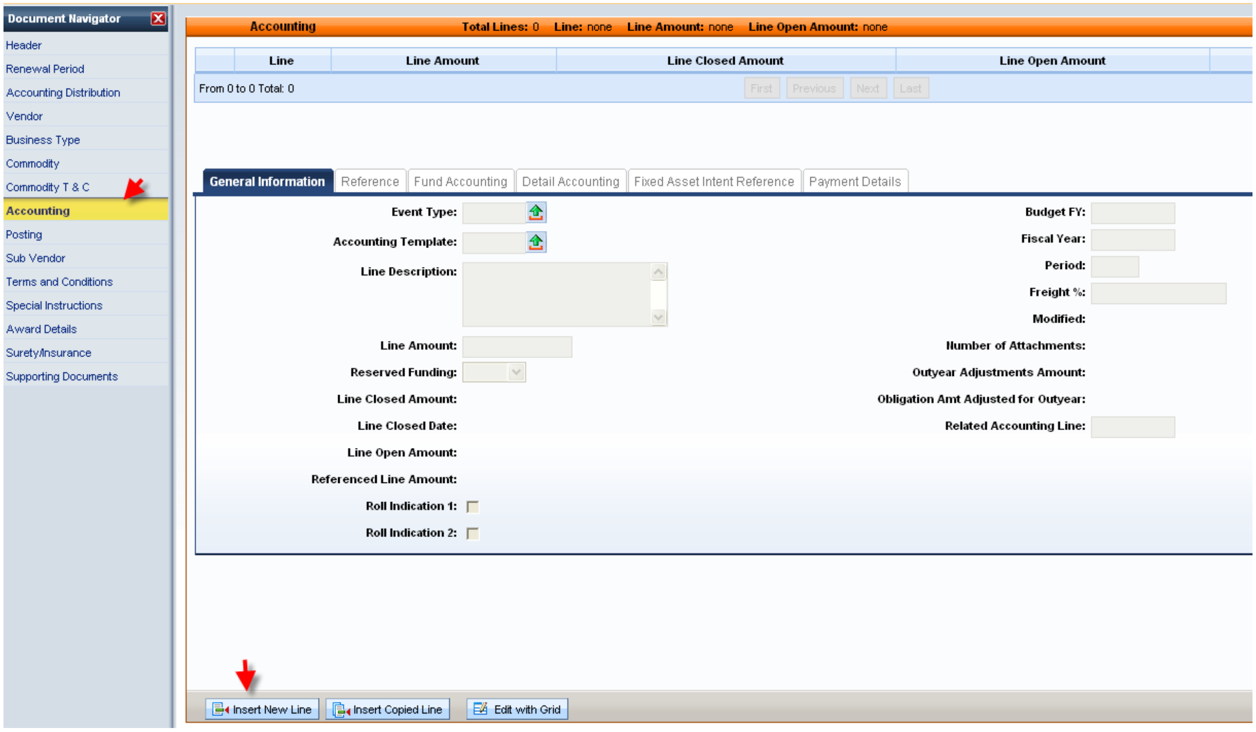
Once the page is activated you will need to enter a CL Description, Commodity, Line Type (service), Contract Amount, Service From and Service To dates. If you do not know your commodity code you can always click on the pick list to search for it.



Now click on the Shipping/Billing tab to enter in your locations. Mine are 18P01 and 18P02 so that is what I will enter. Now you can hit save.

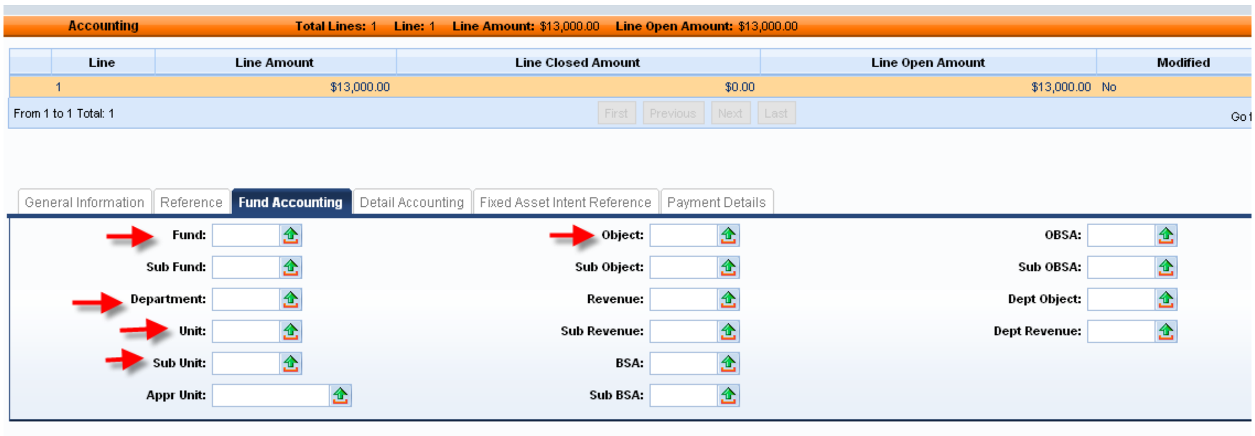


From the Document Navigator on the left hand side click on Accounting. You will notice that the fields are grayed out – you will have to scroll to the bottom to click on Insert New Line:

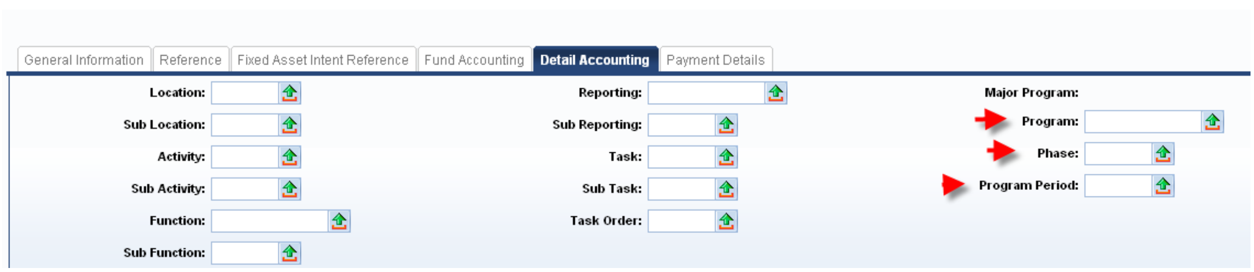


Hint – if you click on Commodity then go back to Accounting the General Information section will automatically fill so you don't have to enter in anything.

Click on the Fund Accounting tab and enter in your Fund, Department, Unit, Sub Unit and Object and click on Save.

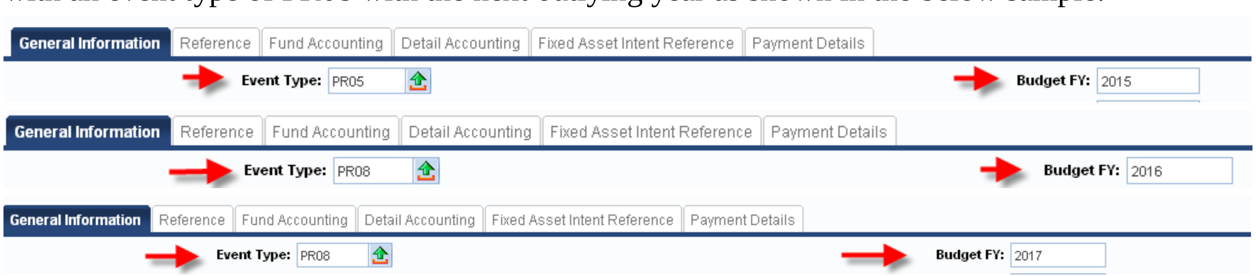


If your agency wants you to fill out the Detailed Accounting section you can click on this Tab to enter information here and click save. You may also have other field in this section to fill out – this is just a sample



If you want to split code to use another accounting string just simply click on Insert New line to enter your second line of coding. You can use as many lines of coding that you want.

Many contracts run multiple years and if this is the case you can stage your contracts. For example if you have a contract that spans 3 years then the 1st year will have an event type of PR05 with the current Fisc year; the 2nd accounting line will have an event type of PR08 with next fisc year and accounting line 3 with an event type of PR08 with the next outlying year as shown in the below sample:

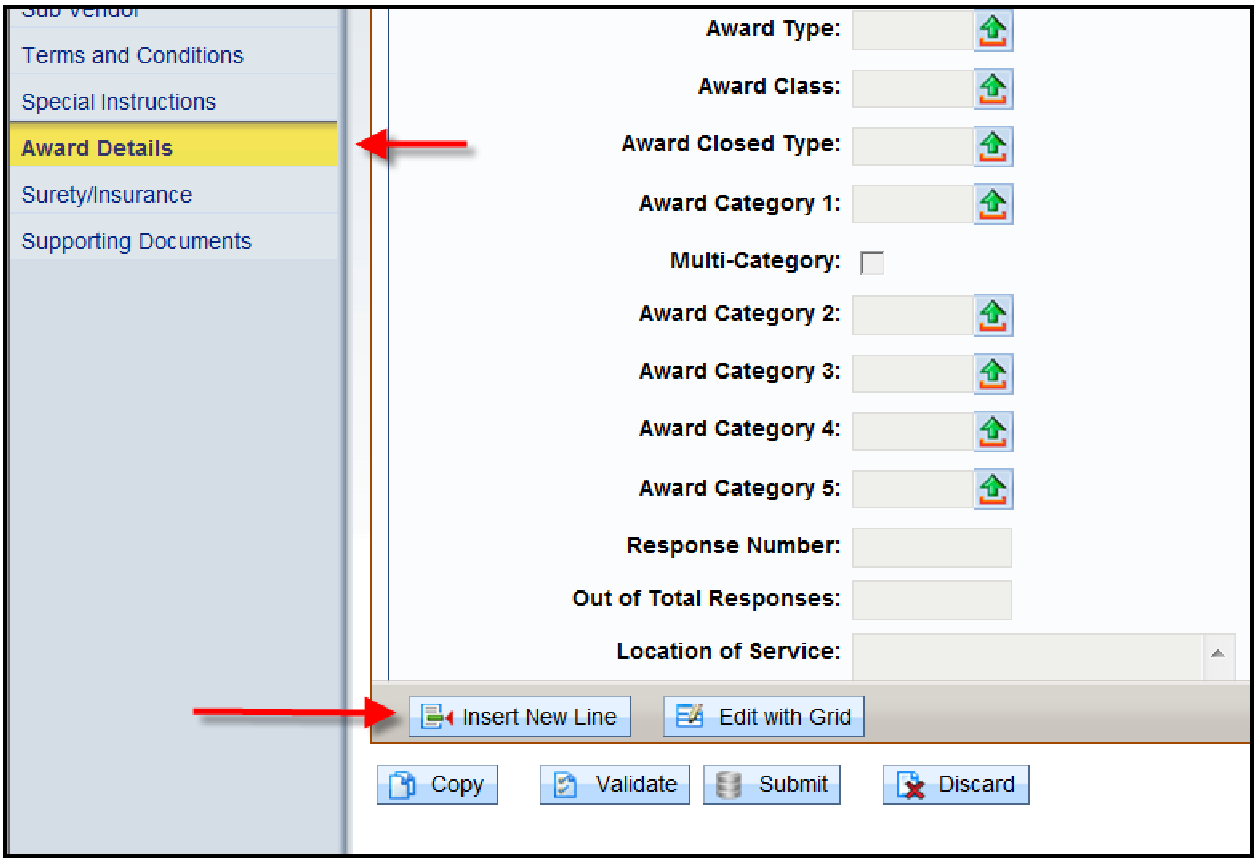


Now the examples shown above are for encumbered documents which is preferred. If you have a need for an unencumbered document then the event type would be PR07 for the current year and for all outlying years.

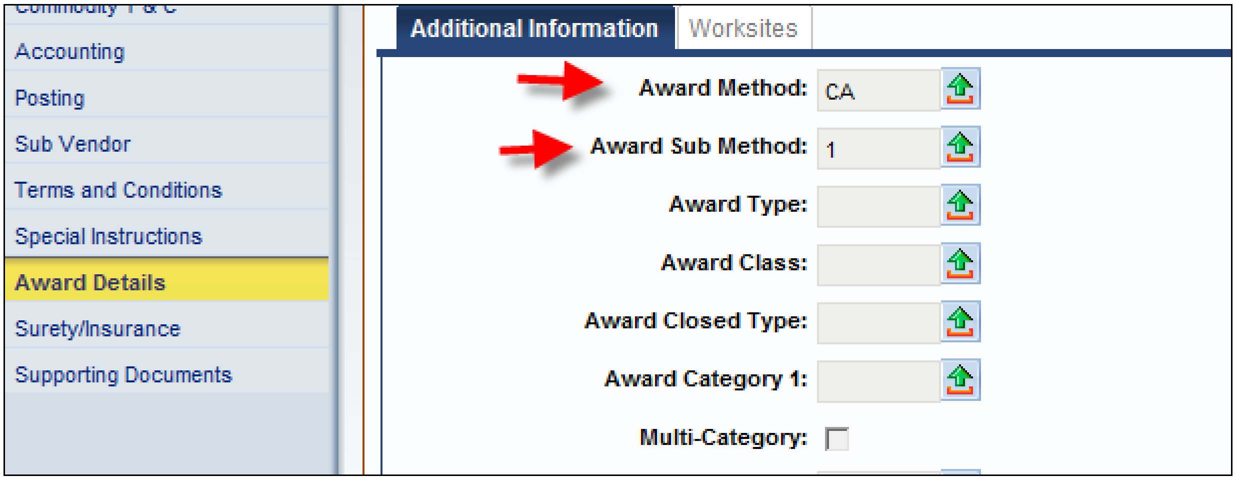
NEW STEP – AWARD DETAILS

Award Details is a new step in the creation of the CT – it specifies how the award to the vendor was made and the general reason for the CT modification. This corresponds to the BP37 document that you submit along with your contract. If you are not sure about which BP37 document to use, please go to our website at http://www.maine.gov/purchases/info/forms.html and scroll down to Supplemental Documents. For contracts and CT modifications that do not require a BP37 form, there are options to select for these situations.

Step 1: Click on Award Details in the secondary navigation panel and insert new line.



Step 2: You will need to select an Award Method. Award Sub Method is required if you pick Award Methods “CA” or “WCB”.



Here are the choices for the Award Method. NA is only to be used for contract types that don’t require a BP37, such as a BP18 contract.

	Award Method Code	Name
Select	AM	Amendment
Select	CA	Competitive Award
Select	NA	Other Contract Type
Select	PA	Participating Addendum
Select	PM	Paperless/Admin Modification
Select	TEM	Temporary Services
Select	WCB	Waiver of Competitive Bidding

Here are the choices for the Award Sub Method – 1 and 2 are for BP37CA forms, and 3 through 7 are for WCB forms:

	Award Sub Method Code	Name
Select	1	CA - Request For Proposals
Select	2	CA - Competitive Quotes under $10K
Select	3	WCB-County Commissioners
Select	4	WCB-Emergency
Select	5	WCB-Only One Source
Select	6	WCB-Petroleum Products
Select	7	WCB-Cooperative Agreement
Select	8	WCB-$10,000 or Less
Select	9	WCB-Other

You are now all set to validate & submit your document. This will put your document in pending status. Your approver does not get an e-mail so you may want to alert them that they have a document to be approved.

If you run into any problems and require assistance you can call any of the Division of Purchases Staff to assist you in completing your document. Staff information can be located on the Division of Purchases website at http://www.maine.gov/purchases/info/contact.shtml