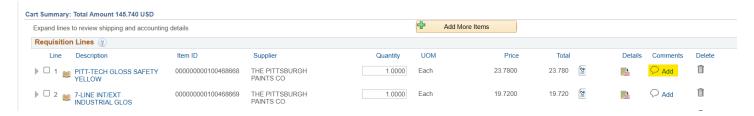
PeopleSoft Documentation Requirements

Uploading purchasing documents into PeopleSoft is critical for efficient approval workflow and procurement transparency. Please follow the guidelines below.

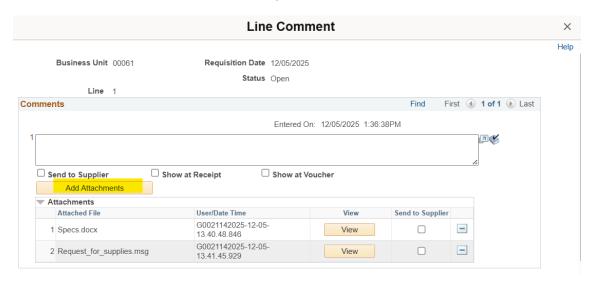
Requisitions

Where to attach:

In the Comments section on the first line of the requisition.



Click the Add Attachments button to upload documents.



What to attach (if applicable):

For purchases <\$5000:

- Emails from the requester.
- Approval from IDOA Vendor Manager (if purchasing outside a QPA).
- Specifications.
- Record of Special Procurement form for purchases <\$5000.

Record_of_Special_Procurement_fillable.pdf

• IOT approval (for all IT purchases).

For purchases >\$5000:

- Emails from the requester.
- Approval from IDOA Vendor Manager (if purchasing outside a QPA).
- · Specifications.
- IOT approval (for all IT purchases).

Sourcing Events

For purchases \$5000 - \$74,999

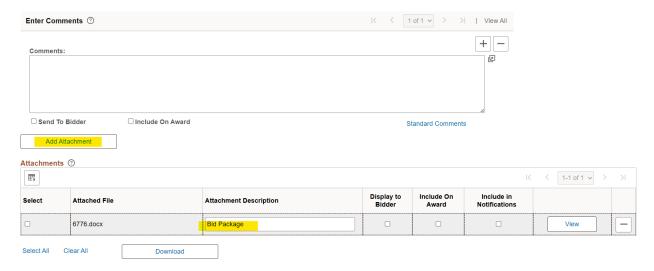
(Purchases of \$75,000 and over are administered by IDOA. IDOA will create the sourcing event).

Where to attach:

Event Comments and Attachments (in Create Events)



Use the Add Attachment button to upload bid documents. Name the document in the Attachment Description field. The three checkboxes (Display to Bidder, Include On Award, and Include in Notifications) should be unchecked.



What to attach:

- Bid package
- Specifications (if applicable)
- Any other bid documents which require attention from bidders.
- Addendums (if a new event version is created)

Note: PeopleSoft will post the Event Details document in Event Comments and Attachments after the event is posted.

Event Description Field:

The Event description field should contain, at a minimum, the following language. This language will appear on IDOA's Current Bid Opportunities website (IDOA: Procurement: Current Business Opportunities) after the event is posted. Communicating key bid information to potential bidders helps ensure you administer a successful, competitive sourcing event.

- A brief description of the requested goods or services. For example:
 - "Sourcing event #0000086245 is for obtaining bids for vendor to provide a hosted Learning Management Service (LMS) platform with administrative access, technical support, and access to a national course catalog."
 - "Stone Order for Brookville Lake stone is needed for re-surfacing trails, parking lots, around buildings, etc. Aggregate stone for use on access lanes, around buildings, and for erosion control purposes."
- "Responses must be emailed to <enter buyer email address> or mailed to: <enter buyer name and mailing address>. This bid is NOT eligible for electronic submission through the supplier portal."
- "A completed bid package MUST be submitted by the due date/time. The bid package is available for download through the Bid Documents link in the Event Name column."
- "If you have any questions, please contact <enter buyer name> at <enter email address and phone number>."

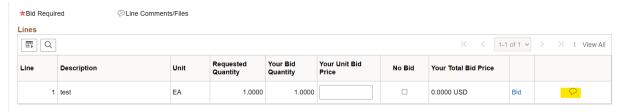
If an addendum to the sourcing event is required, a new event version must be created (see p.3 of How to Post Agency RFQs) and the language below must be added at the top of the Event Description field. Adding this information helps communicate to potential bidders that the bid has changed since it was originally posted.

Supplier Bid Responses (created by agency)

Where to attach:

Line Comments and Attachments in Create Bidder Response.

Click the View/Edit Question Comments and Attachment icon on Line 1.



Use the Upload button to upload the bidder's bid documents.

If more than one bid document needs uploaded, use the Add New Attachment link to add a new line. Continue to upload and add lines, as needed.



What to attach:

- Bidder's completed bid package.
- Any other bid documents required from the bidder.

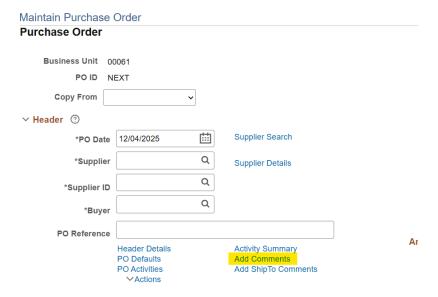
Bid Responses must be created for ALL bidders.

Purchase Order (with no contract)

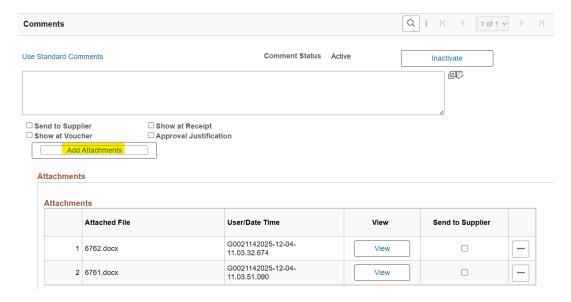
Where to attach:

PO Header Comments

Click Add Comments on the Maintain Purchase Order screen (the link will read "Edit Comments" if comments have already been entered).



Use the Add Attachment button to add a document. Repeat to add all required documents. The Send to Supplier checkbox for each document should be unchecked.



What to attach:

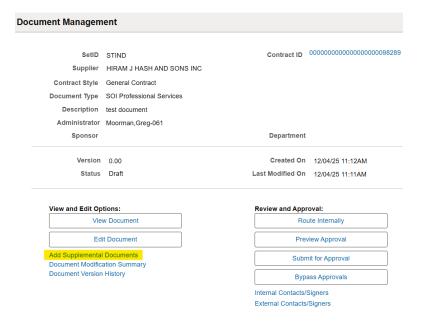
- DPAP Solicitation Summary and related documentation.
- Split bid analysis spreadsheet for all solicitations with 15 or more lines.
- IDOA Vendor Manager Approval (if purchase was made outside of QPA)
- Clearance checks (DWD and DOR). Required if PO is greater than \$2500.
- Proof of Secretary of State registration or proof that the supplier isn't required to register with the Secretary of State. Applies to all dollar amounts.
- State and Federal suspended supplier lists (with proof awarded supplier is not on it). Applies to all dollar amounts.
- SPR Documents (if applicable), including SPR justification form, IDOA approval, and supplier quote.
- IDOA Award Recommendation letter (if IDOA administered the solicitation)
- Any additional approvals or documentation specific to the purchase (such as an approved State Surplus Property form, internal agency forms, or justification and proof of fair and reasonable pricing if purchased outside of QPA.)
- Any quote paperwork not attached to the sourcing event before it was awarded.
- Copies of contracts not posted on the Indiana Transparency Portal.

Purchase Order (with a contract)

Where to attach:

"Add Supplemental Documents" link on SCM contract Document Management page.

Note: If the contract already has documents attached, the link will read "Modify Supplemental Documents." Whichever way the link reads, upload the attachments there.



What to attach:

- DPAP Solicitation Summary and related documentation.
- Split bid analysis spreadsheet for all solicitations with 15 or more lines.
- IDOA Vendor Manager Approval (if purchase was made outside of QPA)
- Clearance checks (DWD and DOR). Required if PO is greater than \$2500 and required on ALL contracts.
- Proof of Secretary of State registration or proof that the supplier isn't required to register with the Secretary of State. Applies to all dollar amounts.
- State and Federal suspended supplier lists (with proof awarded supplier is not on it). Applies to all
 dollar amounts.
- SPR Documents (if applicable), including SPR justification form, IDOA approval, and supplier quote.
- IDOA Award Recommendation letter (if IDOA administered the solicitation)
- Any additional approvals or documentation specific to the purchase (such as an approved State Surplus Property form, internal agency forms, or justification and proof of fair and reasonable pricing if purchased outside of QPA.)
- Any quote paperwork not attached to the sourcing event before it was awarded.
- Copies of contracts not posted on the Indiana Transparency Portal.