

Procurement Documentation Submittal

LaGov Agencies – The PROACT system serves as a learning and communication tool to ensure that all documents related to a transmittal are provided in accordance with the Office of State Procurement Procedures.

Non-LaGov Agencies - The PROACT system provides a means to attach documents related to a transmittal in accordance with the Office of State Procurement Procedures.

Procurement Handbook link

<http://www.doa.la.gov/osp/agencycenter/procurementhandbook.pdf>

PROACT User Guide

<http://www.doa.la.gov/ots/pdfs/PROACTUserGuide.pdf>

Office of State Procurement Help Desk – (225) 342-8010

Office of State Procurement Help Desk – Email DOA-OSPHelpDesk@LA.GOV

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Agency Home Screen

The Home screen displays procurement requests by status.

- **Created** - Requests in progress and saved by agency or end user, but not yet submitted to OSP.
- **Submitted to OSP** - Requests with applicable documentation that has been submitted to OSP for initial review and possible further processing.
- **Assigned to Buyer** - Requests that have been assigned to OSP buyer and are under detailed review.
- **Returned to Agency** - Requests that have been returned to the agency for additional information or clarification. If an agency fails to respond on the returned submittal within 14 calendar days, the request will be rejected resulting in a new request being required.
- **Ready to Work** - Requests that OSP has determined to be ready for further processing. After review, the buyer has determined that all necessary documentation has been received and procurement process is in progress.
- **Out on Bid** - Requests that have been either posted to LaPAC for bid or awaiting evaluation of bids received to make an award.
- **Rejected** - Requests that have been marked as rejected have expired. After a request is returned to the agency, State Procurement allows a 14 calendar day turnaround time for the requested information to be provided and resubmitted to OSP. Rejected requests must be cancelled in ISIS and recreated. The previous number may not be reused once it has been cancelled but should be referenced with resubmitted new request.
- **Awarded** - Requests that have been finalized and Purchase Order issued.
- **Cancelled** - Requests that have been cancelled. These requests will also need to be cancelled in AGPS (or LaGov).

Adding a new Request (Create Request)

Click on the [\[+\] Add New Request](#) link. The Procurement Documentation Submittal form will display.

- **Date** - Creation Date is the default. The system will automatically insert this date.
- **From** – User and Department generating the request based on the personnel number of the employee entering the request.
- **Contact Information** - Contact Information of the person that is submitting the request to OSP.
- **Org Unit** - *Required. Organization unit for the request.
- **LaGov/ISIS Number** - *Required. LaGov (RFx or Shopping Cart) or ISIS (requisition, solicitation or PO) reference number. Submitter should check this number carefully to make sure it matches the LaGov/ISIS number.
- **Resubmittal** – Select this checkbox if this is a new procurement submittal that is following a rejected request.
- **Previous Number** - If this is a Resubmittal, select the previously rejected requisition, PO, solicitation, RFX or shopping cart number for reference.
- **Brief Description** - *Required. 30 character short description.
- **Requisition Amount** – *Required. Requisition/RFx amount that was entered in ISIS/LaGov.
- **Current Status** - Displays current status. Click on [View History] for historical dates/times of workflow statuses.
- **Type of Procurement** – *Required. One of these must be selected.
 - One Time Buy: One time purchase of goods; does not contain a repurchase clause and no increase/decrease is allowed.
 - Service/Maintenance/Blanket Order: Service/Maintenance is a purchase of ongoing service or maintenance for a certain period of time; Blanket Order is a purchase of goods wherein more than one (1) delivery can be made during a specified period of time.
- **LaGov Capital Asset (Yes/No)**– Only LaGov agencies will see this option, and one of these must be selected. Select “Yes” if you are purchasing an item that is classified as tangible, non-consumable, moveable property, over \$5,000 that will be owned by your agency.
- **Special Conditions** - If any of these checkboxes are selected, the submittal form will expand to display a list of additional supporting documentation (refer to [Procurement Handbook](#) for information) that will be required to process your transmittal. If this documentation is not provided, the Office of State Procurement will return to the Agency for additional information.
 - Sole Source Purchase
 - Proprietary Purchase
 - Authorized Dealer Repair or Parts
 - Renewal/Repurchase
 - Change Order
 - Exempt per Small Purchase Executive Order
 - RFP
 - Vehicles
 - Labor & Materials Project/Construction
 - Printing

Required Documentation:

Attaching a Document (ISIS Agencies):

Click the Browse button to locate the attachment on your computer, select the File and then click Open. After clicking the Save button, attachments will display under the appropriate area. Additional attachments can only be added before submittal to OSP. Once submitted to OSP, attachments can only be added if OSP Returns to Agency.

Uploaded in LaGov (LaGov Agencies):

Select the checkbox to confirm that the document was uploaded in LaGov.

Save

Will save any information. After saving the submittal, it will remain in Created status until submitted to OSP. In order to save, Org Unit must be selected and either the LaGov/ISIS number or brief description must be entered.

Save and Submit to OSP

Will submit the request to OSP for review. In order to submit to OSP, the Org Unit must be selected, an ISIS or LaGov requisition, PO, solicitation, RFX or Shopping Cart number must be entered, description entered, Requisition Amount entered and Type of Procurement selected. When this action is performed, the request will move to Submitted to OSP status and can no longer be edited by the Agency.

Delete

This option is only available prior to submitting to OSP. After submitting to OSP, the submittal will remain in the PROACT system for historical purposes.

Procurement Documentation Checklist

This screen is for use by the Office of State Procurement only. It will indicate when supporting documentation for either the LaGov/ISIS number is incomplete and requires immediate attention. Requested documentation is required within 14 calendar days of receiving the Return to Agency request. If the documentation is not received within 14 calendar days, the requisition may be rejected. Once rejected, the requisition, PO, solicitation, RFX or Shopping Cart may not be resubmitted. A new requisition/approval process will be required.

OSP Attachments

This function allows OSP to attach documents related to the review process. When the Purchase Order is awarded the Purchase Order number and amount will be entered, and Purchase Order will be attached.

Adding a Comment

The comments tab provides a means to enter comments related to the request. This will serve as a blog between OSP and the agency for communication and cannot be edited/deleted after a comment has been posted.

Enter comment and click one of following buttons:

- Post Comment – will save the comment. No email notification will be sent.
- Post Comment and Send email – will post comment and send email notifying the Agency/OSP that a comment has been posted and requires immediate attention.

History

The status changes the request has been through during the transmittal process.