

Orientation for Procurement Handbook



Welcome to the Procurement Handbook course!

This course will provide you with the information on the Procurement Handbook on how to access, understand, search and locate numerous Parts and Chapters.

Select the NEXT  button to continue

Course Navigation

This course is presented on a series of slides. Navigate through the slides by selecting the NEXT or PREVIOUS button.



PREVIOUS



NEXT

You may exit the course at any time. When you return to the course, you can choose to resume the course or start from the beginning.

Select the NEXT button now to start the course.

Introduction

Upon completion of this course, you should be able to:

- Understand what the Procurement Handbook is and what information it provides
- Access the Online Procurement Handbook via the DGS website and understand screen navigation
- Understand the four parts of the Procurement Handbook
- Search for, locate and preview the numerous Chapters under each Part of the Procurement Handbook



Procurement Handbook Overview



Procurement Handbook Overview

Commonwealth Procurement Law

Act 57 of 1998

- ❖ Signed into law in May of 1998 by former Governor Tom Ridge
- ❖ Act 57 contains the “Commonwealth Procurement Code”, Title 62 of the Pennsylvania Consolidated Statutes
 - The Procurement Handbook is a standard reference guide for the Commonwealth Procurement Code



Procurement Handbook Overview

Commonwealth Procurement Law

Procurement Handbook

- ❖ The Procurement Handbook provides information on the policies, procedures, and guidelines for the procurement of materials, services, and construction under the authority of Act 57 of 1998
- ❖ The Handbook is “Online” in PDF format and no longer exists in hard copy
 - The Handbook is published quarterly (Feb., May, Aug., Nov.)



Procurement Handbook Overview

Commonwealth Procurement Law

Procurement Handbook (cont'd)

- ❖ All Commonwealth Purchasing Professionals should be familiar with the structure and organization of the Procurement Handbook
- ❖ The Handbook is divided into four Parts, with numerous Chapters under each Part
 - The Chapters contain references to various forms, management directives, laws, etc., many with hyperlinks to the corresponding documents.



Navigating the Procurement Handbook



Navigating the Procurement Handbook

How to access the Procurement Handbook

The Procurement Handbook is web-enabled for COPA end-users and is located on the Department of General Services website, under “**Doing Business with the Commonwealth, Procurement**”.


- URL: www.dgs.state.pa.us

The Procurement Handbook is public information and is available for all to view.







Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page

pennsylvania 

PA STATE AGENCIES ▾ ONLINE SERVICES ▾ --search PA-- → go

Procurement | Real Estate | Construction and Public Works | Facilities

Department of General Services	Doing Business with the Commonwealth > Procurement > Procurement Handbook
Right To Know For DGS Employees	DGS Procurement Handbook Search 
Doing Business with the Commonwealth	<input type="text" value="--search PHB--"/> <input type="button" value="GO"/>
Procurement	Online Procurement Handbook 
Agency Dashboard	Welcome to the Pennsylvania Procurement Handbook Online. This handbook provides information on the policies, procedures and guidelines for the procurement of materials, services, and construction under the authority of Act 57 of 1998.  
Supplier Service Center	Utilizing the workflow technology, this handbook will provide you with current, real time procurement information, policies and procedures. The enhanced search functionality will also help enable you to find answers to your questions quickly and easily.
Procurement Forms	Please check back here for the latest procurement information since updates occur regularly.
Procurement Handbook	The Procurement Handbook is not available for download or print as a whole document. The individual handbook chapters, which are accessible from this page, can be downloaded or printed separately. This is the only version of the Commonwealth's official Procurement Handbook.
Part I – Policies and Guidelines	Should you have any questions or recommended updates regarding the Online Procurement handbook or technical issues with the web site, please send an email to gs-procure@state.pa.us .
Part II – Procurement of Supplies Procedures	Additional information on procurement policy is available from the Procurement Code (Title 62- Procurement). This document incorporates the 2002, 2004 and 2007 amendments to the Code.
Part III – Procurement of Services Procedures	07/30/10 12:56 PM



Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page

The screenshot shows the Pennsylvania Procurement Handbook Online interface. On the left is a navigation pane with the following items: Department of General Services, Right To Know For DGS Employees, Doing Business with the Commonwealth, Procurement, Agency Dashboard, Supplier Service Center, Procurement Forms, **Procurement Handbook** (highlighted with a red border), Part I – Policies and Guidelines, Part II – Procurement of Supplies Procedures, and Part III – Procurement of Services Procedures. The main content area has a header with 'pennsylvania PA', 'PA STATE AGENCIES', 'ONLINE SERVICES', and a search bar. Below the header is a breadcrumb trail: 'Doing Business with the Commonwealth > Procurement > Procurement Handbook'. A search bar labeled 'DGS Procurement Handbook Search' with a 'GO' button is present. The main text area contains a welcome message, a description of the handbook's purpose, and links to various sections. The footer shows the date and time: '07/30/10 12:56 PM'.

Note the navigation pane along the left side of the page, and the Procurement Handbook *Search* area above the Welcome Message



Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page

The screenshot shows the Pennsylvania Procurement Handbook Online Welcome Page. The page has a blue header with the Pennsylvania logo and navigation links for PA State Agencies, Online Services, and a search bar. Below the header is a breadcrumb trail: [Doing Business with the Commonwealth](#) > [Procurement](#) > [Procurement Handbook](#). The left sidebar contains a table of contents with links to various sections. The main content area includes a search bar, a welcome message, and contact information. A red arrow points to the email address gs-procure@state.pa.us.

pennsylvania PA	
PA STATE AGENCIES ONLINE SERVICES --search PA-- GO	
Procurement Real Estate Construction and Public Works Facilities	
Department of General Services	Doing Business with the Commonwealth > Procurement > Procurement Handbook
Right To Know For DGS Employees	DGS Procurement Handbook Search
Doing Business with the Commonwealth	--search PHB-- GO
Procurement	Online Procurement Handbook
Agency Dashboard	Welcome to the Pennsylvania Procurement Handbook Online. This handbook provides information on the policies, procedures and guidelines for the procurement of materials, services, and construction under the authority of Act 57 of 1998.
Supplier Service Center	Utilizing the workflow technology, this handbook will provide you with current, real time procurement information, policies and procedures. The enhanced search functionality will also help enable you to find answers to your questions quickly and easily.
Procurement Forms	Please check back here for the latest procurement information since updates occur regularly.
Procurement Handbook	The Procurement Handbook is not available for download or print as a whole document. The individual handbook chapters, which are accessible from this page, can be downloaded or printed separately. This is the only version of the Commonwealth's official Procurement Handbook.
Part I – Policies and Guidelines	Should you have any questions or recommended updates regarding the Online Procurement handbook or technical issues with the web site, please send an email to gs-procure@state.pa.us .
Part II – Procurement of Supplies Procedures	Additional information on procurement policy is available from the Procurement Code (Title 62-Procurement). This document incorporates the 2002, 2004 and 2007 amendments to the Code.
Part III – Procurement of Services Procedures	07/30/10 12:56 PM

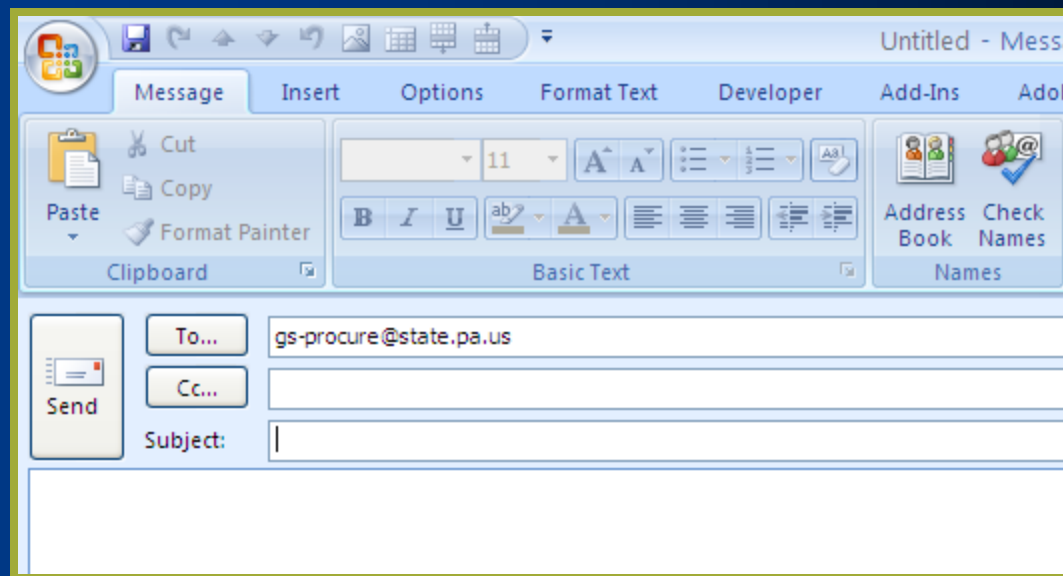
Welcome Message contains key information about the procurement handbook, includes an e-mail hyperlink for questions or recommended updates



Navigating the Procurement Handbook

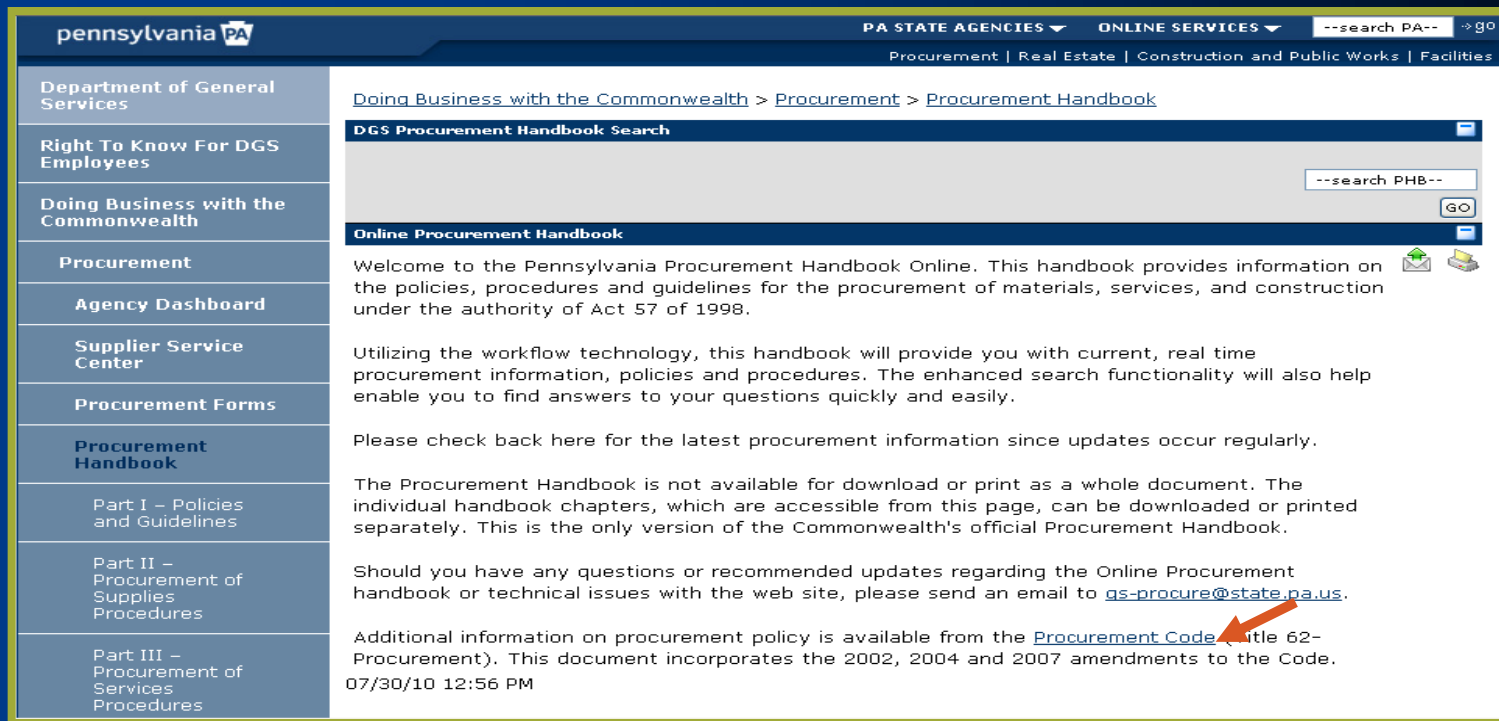
Online Procurement Handbook Welcome Page

When the link is selected an e-mail will display to include questions, updates or technical issues to gs-procure@state.pa.us



Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page



The screenshot shows the Pennsylvania Procurement Handbook Welcome Page. The header includes the Pennsylvania logo, navigation links for PA State Agencies and Online Services, a search bar, and a breadcrumb trail: Procurement | Real Estate | Construction and Public Works | Facilities. The left sidebar lists various services, with 'Procurement Handbook' highlighted. The main content area features a search bar, a welcome message, and detailed information about the handbook's purpose and availability. A red arrow points to the 'Procurement Code' link in the text.

pennsylvania PA

PA STATE AGENCIES ONLINE SERVICES --search PA-- go

Procurement | Real Estate | Construction and Public Works | Facilities

[Doing Business with the Commonwealth](#) > [Procurement](#) > [Procurement Handbook](#)

DGS Procurement Handbook Search

--search PHB-- GO

Online Procurement Handbook

Welcome to the Pennsylvania Procurement Handbook Online. This handbook provides information on the policies, procedures and guidelines for the procurement of materials, services, and construction under the authority of Act 57 of 1998.

Utilizing the workflow technology, this handbook will provide you with current, real time procurement information, policies and procedures. The enhanced search functionality will also help enable you to find answers to your questions quickly and easily.

Please check back here for the latest procurement information since updates occur regularly.

The Procurement Handbook is not available for download or print as a whole document. The individual handbook chapters, which are accessible from this page, can be downloaded or printed separately. This is the only version of the Commonwealth's official Procurement Handbook.

Should you have any questions or recommended updates regarding the Online Procurement handbook or technical issues with the web site, please send an email to gs-procure@state.pa.us.

Additional information on procurement policy is available from the [Procurement Code](#) (Title 62-Procurement). This document incorporates the 2002, 2004 and 2007 amendments to the Code.

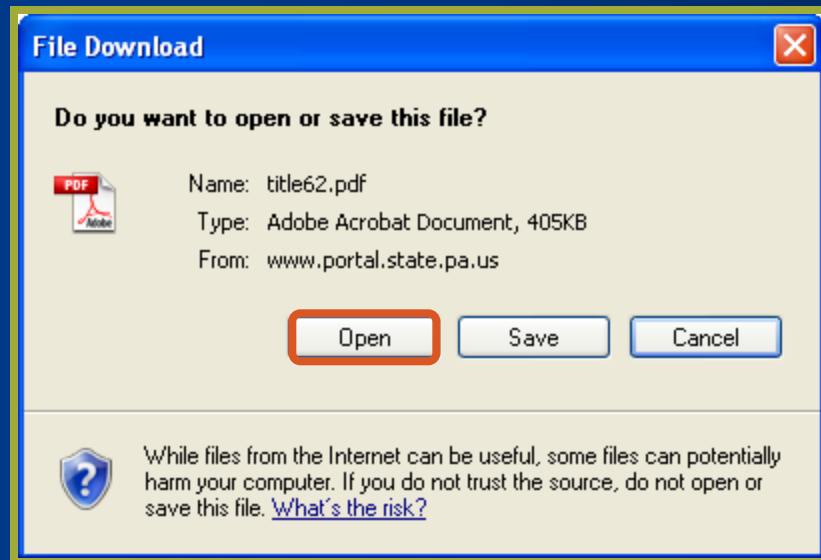
07/30/10 12:56 PM

An additional hyperlink within the Welcome Message will open the ***Procurement Code (Title 62-Procurement)***



Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page



When the link is selected you will be prompted with a dialog box asking whether to open or save this file. Select the ***Open*** button to view the document or save to download it.



Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page

Table of Contents, Title 62 Procurement, Part I
Commonwealth Procurement Code's procurement
policy displays.

TABLE OF CONTENTS
TITLE 62
PROCUREMENT
PART I. COMMONWEALTH PROCUREMENT CODE
Chapter 1. General Provisions
§ 101. Short title of part.
§ 102. Application of part.
§ 103. Definitions.
§ 104. General principles of law otherwise applicable.
§ 105. Determinations.
§ 106. Public access to procurement information.
§ 107. Reciprocal limitations.
§ 108. Recycled materials.
Chapter 3. Procurement Organization
Subchapter A. Organization of Public Procurement



Navigating the Procurement Handbook

Online Procurement Handbook Welcome Page

Procurement Handbook
Part I – Policies and Guidelines
Part II – Procurement of Supplies Procedures
Part III – Procurement of Services Procedures
Part IV – Procurement of Design and Construction Services
Procurement Code (Title 62) ←

- ***The Procurement Code (Title 62)*** can also be accessed by selecting the link from the left navigation menu



Navigating the Procurement Handbook

Now that you understand how to access the Procurement Handbook, we'll move on to understanding the ***Four Parts of the Procurement Handbook***.

Select the NEXT button to proceed with the lesson.



Four Parts of the Procurement Handbook



Four Parts of the Procurement Handbook

Overview

The Handbook is divided into four *Parts* with numerous *Chapters* under each part.

- Part I – Policies and Guidelines
- Part II – Procurement of Supplies Procedures
- Part III – Procurement of Services Procedures
- Part IV – Procurement of Design and Construction Services



Four Parts of the Procurement Handbook

Overview

Procurement Handbook
Part I – Policies and Guidelines
Part II – Procurement of Supplies Procedures
Part III – Procurement of Services Procedures
Part IV – Procurement of Design and Construction Services
Procurement Code (Title 62)

The Procurement Handbook section of the left navigation pane lists the four parts of the Handbook.

This is the only version of the Commonwealth's official Procurement Handbook.



Four Parts of the Procurement Handbook

Overview

Part I – Policies and Guidelines
Part II – Procurement of Supplies Procedures
Part III – Procurement of Services Procedures
Part IV – Procurement of Design and Construction Services

- To access a *Part*, select the link from the left navigation menu



Four Parts of the Procurement Handbook

Now that you have learned about the four Parts of the Procurement Handbook, we'll move on to the Chapters under each Part.

In the next lesson, ***Chapters of the Procurement Handbook***, you will learn the steps to search, locate and preview the numerous Chapters under each Part of the Procurement Handbook.

Select the NEXT button to proceed with the lesson.



Chapters of the Procurement Handbook



Chapters of the Procurement Handbook

Overview

Every Chapter of the Procurement Handbook provides guidance on the various procurement policies and procedures on each of the procurement types and thresholds.



Chapters of the Procurement Handbook

Overview

Procurement Handbook
Part I – Policies and Guidelines
Part II – Procurement of Supplies Procedures
Part III – Procurement of Services Procedures
Part IV – Procurement of Design and Construction Services
Procurement Code (Title 62)

To locate and preview the numerous ***Chapters*** under each ***Part*** of the Procurement Handbook, select the link from the left navigation menu



Chapters of the Procurement Handbook

Overview

Once you select a particular *Part* the various *Chapters* will be listed.

Procurement Handbook Part III	
Name	Object Last Modified
 Pt III Ch 01 Small No-Bid Procurements.pdf	8/3/10 7:47 PM
 Pt III Ch 02 Small Informal Bid Procurements.pdf	8/3/10 7:47 PM
 Pt III Ch 03 Delegated Formal Competitive Sealed Bidding.pdf	8/3/10 7:47 PM
 Pt III Ch 04 Competitive Sealed Bidding.pdf	8/3/10 7:47 PM
 Pt III Ch 05 Sole Source Procurements of Services.pdf	8/3/10 7:47 PM
 Pt III Ch 06 Emergency Procurements of Services.pdf	8/3/10 7:47 PM
 Pt III Ch 07 Competitive Sealed Proposals RFP Process.pdf	8/3/10 7:47 PM
 Pt III Ch 08 Competitive Selection Procedures for Certain Services (Accounts Clergy Physicians Lawyers Dentists and Other Professional Services).pdf	8/3/10 7:47 PM
 Pt III Ch 09 Procurement from Effective DGS Statewide Requirements Contracts for Services.pdf	8/3/10 7:47 PM
 Pt III Ch 10 Procurement of Contract Items Off-Contract.pdf	8/3/10 7:47 PM

Disclaimer – the information in the Object Last Modified column is inaccurate. This column will be removed.



Chapters of the Procurement Handbook

Overview

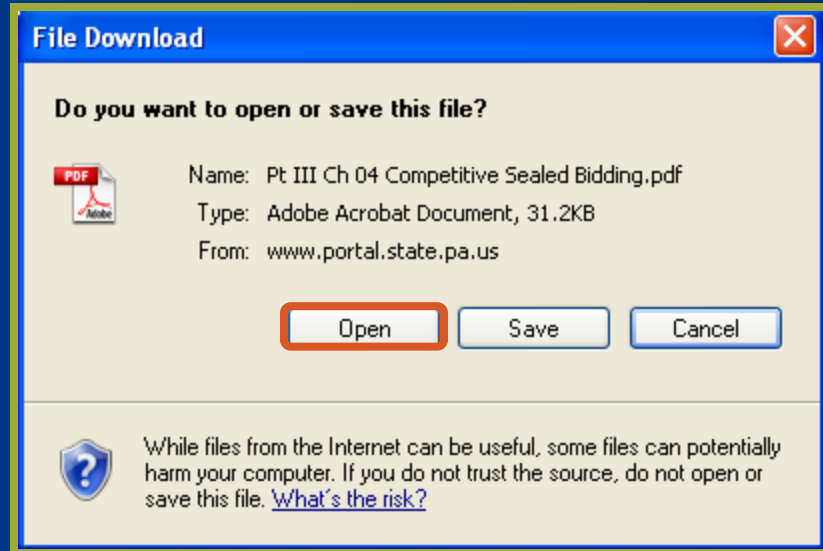
Procurement Handbook Part III	
Name	
	Pt III Ch 01 Small No-Bid Procurements.pdf
	Pt III Ch 02 Small Informal Bid Procurements.pdf
	Pt III Ch 03 Delegated Formal Competitive Sealed Bidding.pdf
	Pt III Ch 04 Competitive Sealed Bidding.pdf 
	Pt III Ch 05 Sole Source Procurements of Services.pdf
	Pt III Ch 06 Emergency Procurements of Services.pdf
	Pt III Ch 07 Competitive Sealed Proposals RFP Process.pdf
	Pt III Ch 08 Competitive Selection Procedures for Certain Services (Physicians, Lawyers, Dentists, and Other Professional Services).pdf
	Pt III Ch 09 Procurement from Effective DGS Statewide Required Services.pdf
	Pt III Ch 10 Procurement of Contract Items Off-Contract.pdf

To preview a specific *Chapter*, select the link from the list of names. For example, select Part III Chapter 04 to view this chapter on Competitive Sealed Bidding.



Chapters of the Procurement Handbook

Overview



When the link is selected you will be prompted with a dialog box asking whether to open or save this file. Select the ***Open*** button to view the Chapter or save to download it.



Chapters of the Procurement Handbook

Overview

Part III Chapter 04, Competitive Sealed Bidding for Services displays.

Version: February 2011

Part III Chapter 04 Competitive Sealed Bidding

- A. Requirements.** This procedure may be used by agencies when services to be procured through competitive sealed bidding:
1. Are not listed on an effective DGS statewide requirements contract.
 2. Are available from more than one supplier and do not constitute a sole source procurement.
 3. Have a total value greater than the dollar limit for delegated procurements thresholds identified in [Part I, Chapter 07 – Thresholds and Delegations](#).
- B. General.** DGS shall issue IFBs and award contracts for services with a total cost in excess of the dollar limit for delegated procurements unless the Agency has received specific written delegation from the Secretary of General Services or designee. Agencies are required to submit a shopping cart to DGS to initiate the process. All shopping carts must be approved by the agency comptroller.



Summary

Thank you for viewing the Online Procurement Handbook. You are now able to:

- Understand what the Procurement Handbook is and what information it provides
- Access the Online Procurement Handbook via the DGS website and understand screen navigation
- Understand the four parts of the Procurement Handbook
- Search for, locate and preview the numerous Chapters under each Part of the Procurement Handbook



Survey

Select the link below to complete an online survey

<https://www.surveymonkey.com/s/6NQV2FD>

Congratulations! You have completed the course. You will receive credit for completing this course within 24 hours. Please select the “Log Off” button in the lower right corner to close this course

Thank You!

