

PPRB Petition for Relief MAGIC Procedure

This document provides step-by-step instructions on:

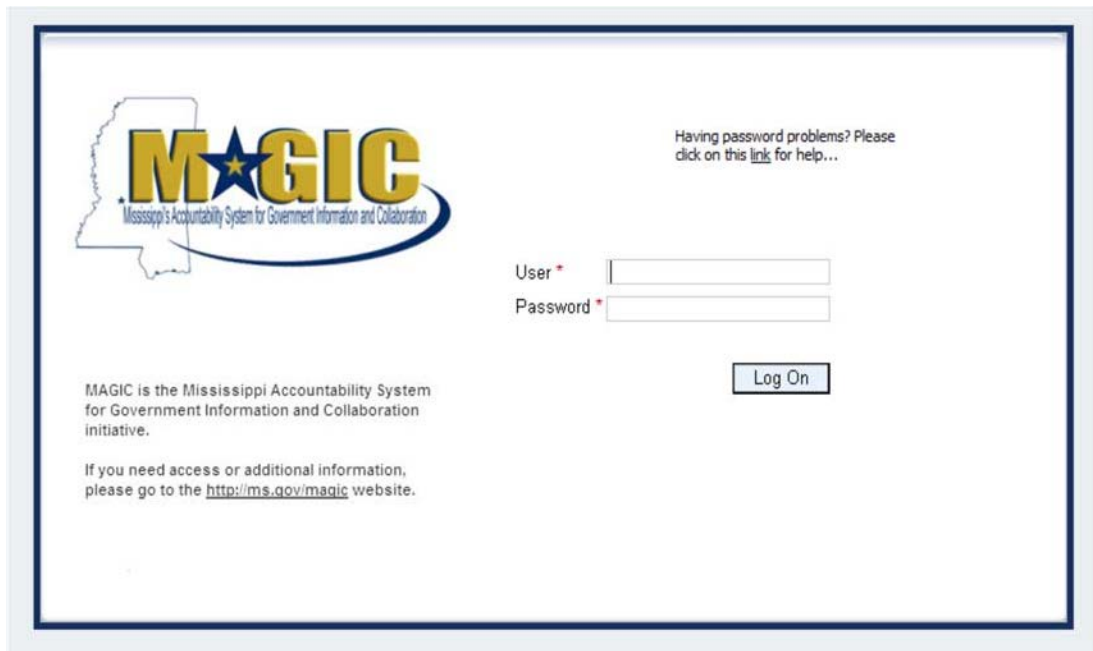
- (1) How to submit a request to PPRB for approval to procure services through an RFP or RFQ and,
- (2) How to publish the approved RFP or RFQ to the procurement portal after PPRB approval.

Unless statutorily exempt, this process **must** be used by State Agencies to procure personal and professional service contracts through an RFP or RFQ. The agency will create the request using the OVAR RFX type. Upon PPRB approval, OPSCR will approve the request, but **the agency must complete steps** to create the RFP or RFQ **and** issue it to the procurement portal. If the process is correctly completed, the agency will have two RFX numbers, one that begins with 3180000000 and one that begins with 3120000000.

Submit Petition for Relief to OPSCR

1. Enter User ID and Password to log in to MAGIC:

<https://portal.magic.ms.gov>



MAGIC is the Mississippi Accountability System for Government Information and Collaboration initiative.

If you need access or additional information, please go to the <http://ms.gov/magic> website.

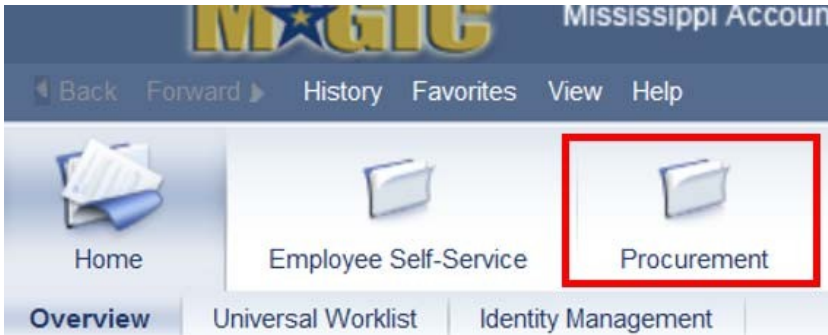
Having password problems? Please click on this [link](#) for help...

User *

Password *

Log On

2. Select the “**Procurement**” tab at the top.



3. Make sure “**Procurement Work Center**” is selected.



4. Select the “**RFx**” under the Strategic Sourcing > Create Documents header.



5. Select RfX Type **OVAR**, then click **Continue**.

Select RfX Type

Select the type of RfX you want to create

RfX Type	RfX Type Description
IFBD	Invitation for Bid
NBID	Negotiated Bid
OVAR	Oversight Appv Reqst
OVEX	Oversight Exempt
PREQ	Procurement Request
RFIN	Req. for Information
RFPR	Request for Proposal
RFQF	RFQ - Formal

Enter External Number

Continue to Page 4.

RFx Information

Make sure the **RFx Information** > **RFx Parameters** tab is selected. Enter the following data elements:

Identification:

- a) **Smart Number:** Enter Name of Agency
- b) **Type:** Should autofill “Oversight Appv Request”
- c) **Publication Type:** Restricted RFx

Dates:

- d) **Start Date:** (not required)
- e) **Surrogate Bid Entry Deadline:** Friday following anticipated PPRB meeting
- f) **Opening Date:** Friday following anticipated PPRB meeting
- g) **Bidder Submission Deadline:** Friday following anticipated PPRB meeting

Event Parameters:

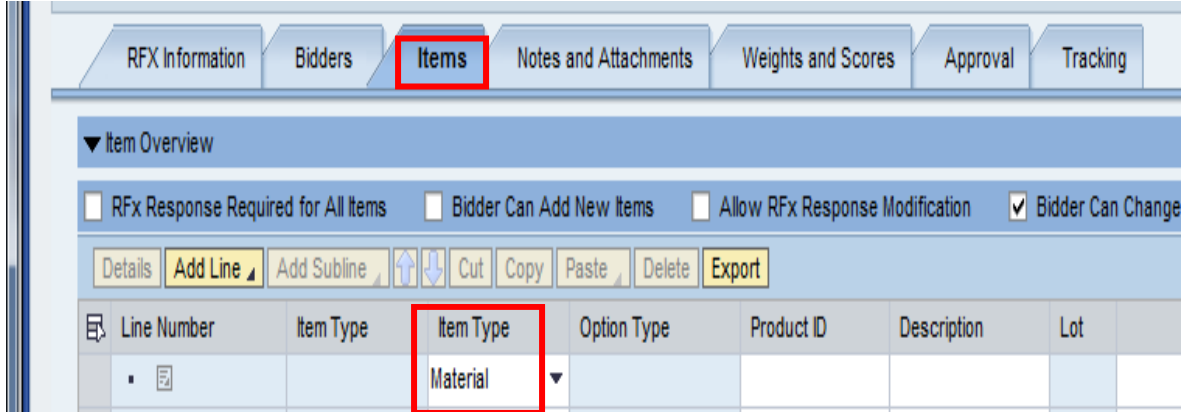
- h) **Major Procurement Category:** PERSONNEL SERVICES NON-IT
- i) **Sub Procurement Category:** PERSONNEL SERVICE - NON-TECHNOLOGY
- j) **Request Type:** RFP or RFQ AUTHORIZATION REQUEST

The screenshot shows the 'RFx Information' tab with the following data entered:

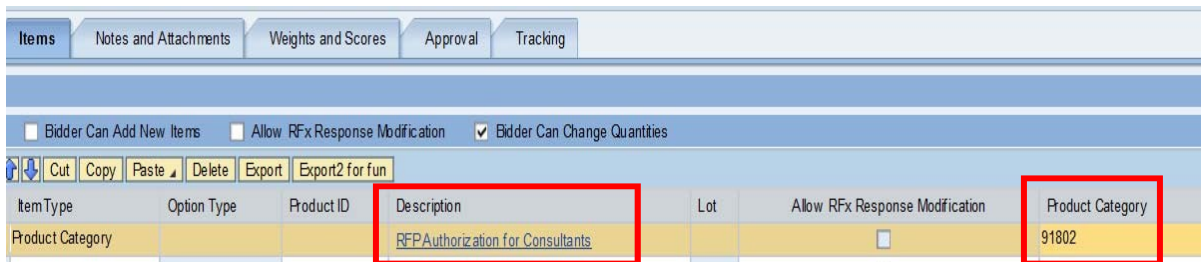
Section	Field	Value
Identification	Smart Number	DEPT OF FINANCE & ADMIN
	Smart Number is External	<input checked="" type="checkbox"/>
	Type	Oversight Appv Request
	Publication Type	Restricted RFx
Event Parameters	Currency	USD
	Target Value	0.00 USD
	Detailed Price Information	No Price
	Follow -On Document	Purchase Order or Contract
	Bidder Can Change RFx Responses	<input type="checkbox"/>
	Allow Multiple RFx Responses for Each Company	<input type="checkbox"/>
Event Parameters (highlighted)	* Major Procurement Category	PERSONNEL SERVICES NON-IT
	* Sub Procurement Category	PERSONNEL SERVICE - NON-TECHNOLOGY
	* Request Type	RFP - AUTHORIZATION REQUEST
Dates	Start Date	12:00:00 AM
	* Surrogate Bid entry Deadline	2017/12/21 12:00:00 AM
	Opening Date	2017/12/20 03:35:00 PM
	End of Binding Period	
	Valid From / To	
	* Bidder Submission Deadline	2017/12/20 03:35:00 PM
	Electronic Responses Only	<input type="checkbox"/>

Add Items to the RFx

- a) Select the **Items** tab, then under “**Item Type**” click dropdown to select “Product Category” from list.



- b) Under the “**Description**” column, enter a short description of the service (40 characters or less). Then, under the “**Product Category**” column enter the NIGP Code for the service you are trying to procure. (For help finding a code, use the attached excel spreadsheet).

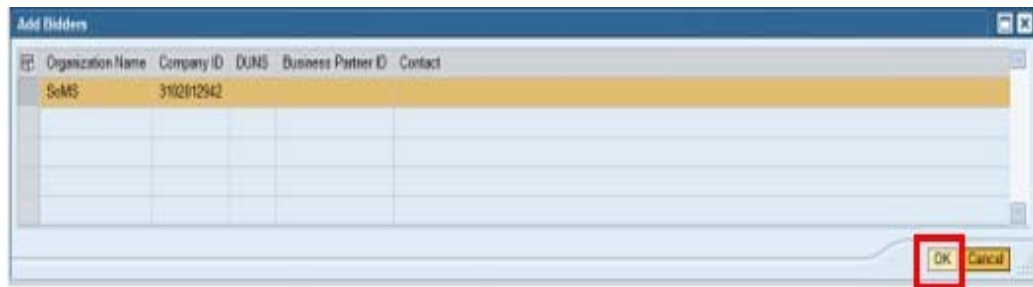


Add “State of MS Vendor” to the RFx

- a) Click on the ‘**Bidders**’ tab.
b) Enter “3102012942” in the “**Add Bidder by Company ID**” field. Click the “**Add**” button.




- c) The Bidder, “SoMS” should be displayed. Click the “OK” button to confirm.



Add Notes and Attachments to the RFx

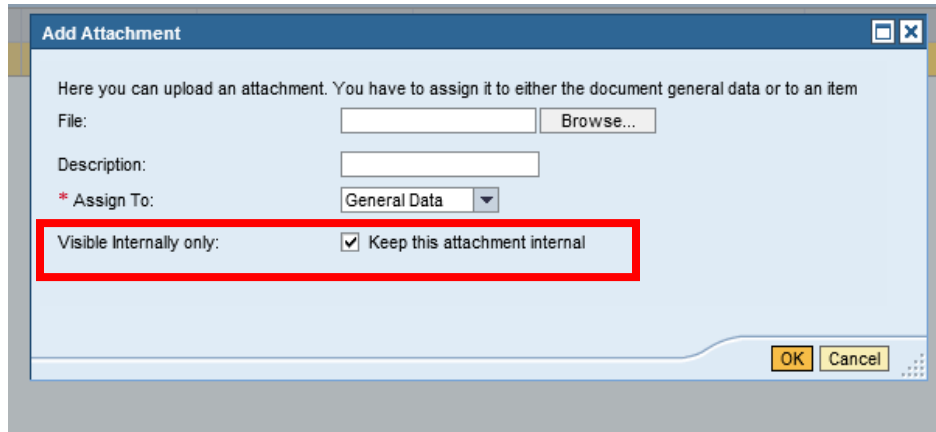
- a) Click on the ‘Notes and Attachments’ tab. Click “Add” > “Synopsis Description”
- b) **Synopsis Description** (required) – This should be a short concise description of 80 characters maximum. **It should begin with: “RFP/RFQ Solicitation for...Services.”**
- a. Note: This will become the public description for this solicitation when the follow-on RFx is created.



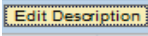
- c) Add “Attachments” by selecting  . You must upload the completed and executed **Petition for Relief Form**.



- d) This document should only be visible internally to OPSCR and the agency submitting the Petition for Relief;
 - a. Make sure the box that indicates “Visible Internally Only” is checked.



Attachments can be in any file extension. However, it is normally best practice to use common file extensions such as pdf, xlsx, or doc.

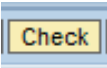

- e) The Description field is a short description of the attachment; it can be edited by clicking the “Edit Description”  button.

SAMPLE ATTACHMENTS:

▼ Attachments				
Add Attachment Edit Description Versioning Delete Create Qualification Profile				
Assigned To	Category	Description	Version	Processor
Document Header	Standard Attachment	Request for Proposal (RFP)	1	
Document Header	Standard Attachment	Petition for Relief	1	

*You can submit your entire procurement, but unless you previously requested a Pre-Review, it will not be reviewed by OPSCR.

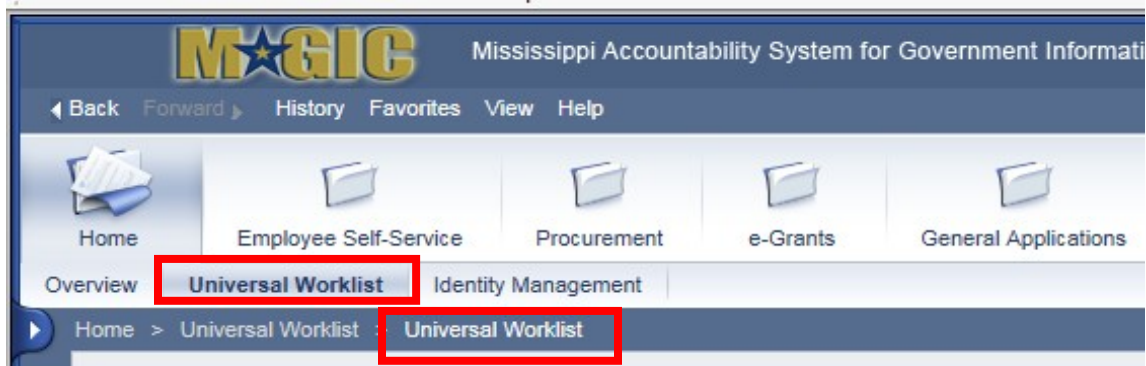
Submit the Petition for Relief

Publish the RFX by clicking  first to ensure there are not any errors and to confirm that the Petition for Relief has all relevant information populated and attached, then click the  button. The Publish button is only visible in “Edit” mode. After properly submitting, the status should change to “Awaiting Approval”.

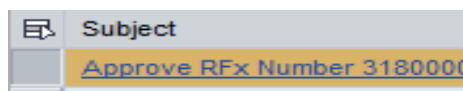
Agency Level Internal Approval

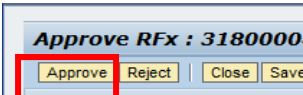
The RFX may require Agency Manager Approval **BEFORE** Oversight (PPRB) approval.

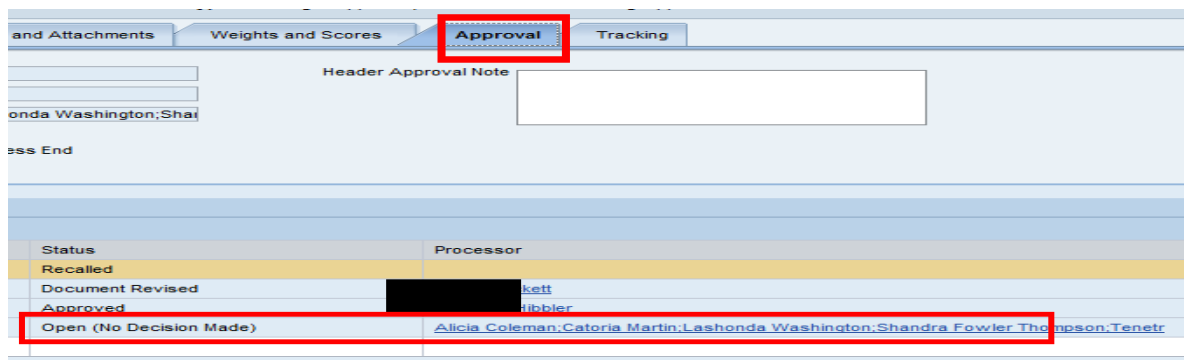
- a) Log into MAGIC and in the “Home” screen click “Universal Worklist”.



- b) Click “Approve RFX Number 318000000”



- c) Click “Approve” , complete the approval process, then click the “Approval” tab, you should see “Open (No Decision Made)” with the OPSCR analysts names listed. If you do not see the OPSCR analysts names, complete the approval process at the agency level.



Once the Agency Buyer Manager has approved the OVAR and submitted it by the deadline, OPSCR will review the request and place it on the PPRB agenda for consideration at the next monthly board meeting.

ONCE THE PETITION FOR RELIEF IS APPROVED by OPSCR.
CONTINUE TO PAGE 9

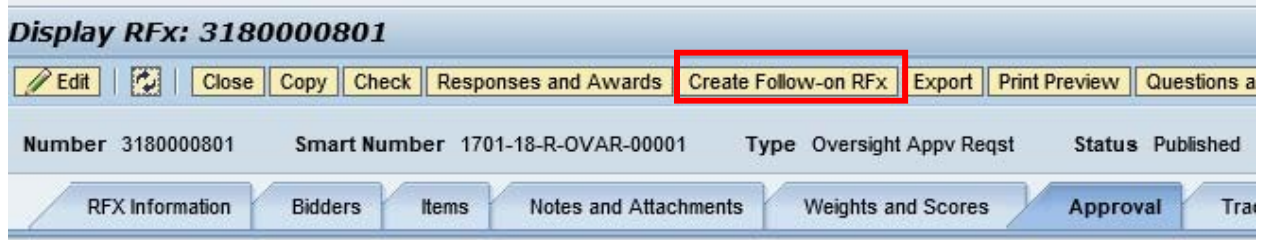
******The submission is not complete until the Petition for Relief is uploaded to the DEA OPSCR Contract Portal, located at: <https://contracts.dfa.ms.gov/>. ******

AFTER PPRB APPROVAL

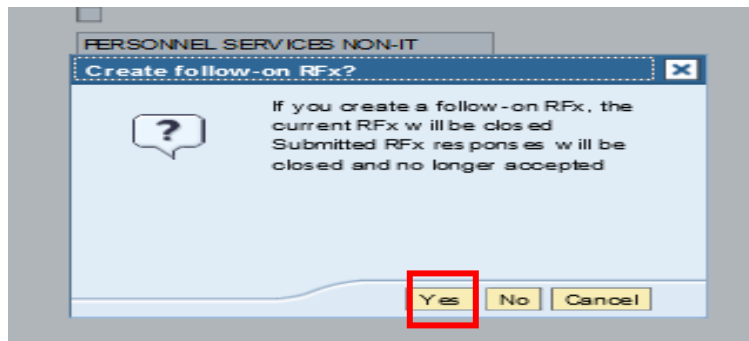
Follow-on RFP/RFO Creation from an Approved OVAR

Once the Petition for Relief is approved by PPRB, a follow-on RFP/RFO can be created from the OVAR.

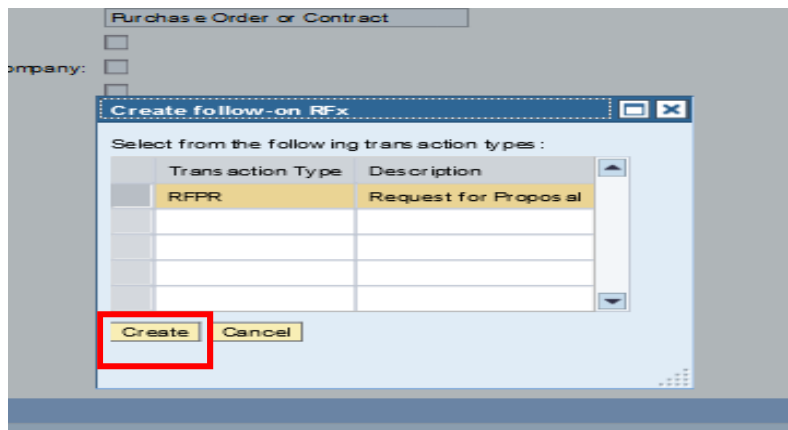
- a.) Click “Create Follow-on RFX” from your OVAR document



- b.) Select “Yes”



- c.) Select “Create”



RFx Information

Make sure the **RFx Information > RFx Parameters** tab is selected. Change the following data elements:

Identification:

- a) **Publication Type:** Public RFx

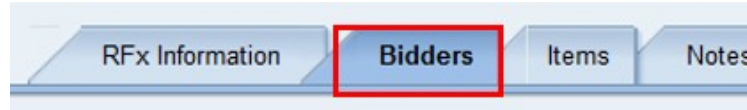
Dates:

- b) **Start Date:** Date in the future
c) **Surrogate Bid Entry Deadline:** Date in the future
d) **Opening Date:** Date in the future
e) **Bidder Submission Deadline:** Date in the future (there should be at least 30 days between the “start date” and the “submission deadline”)

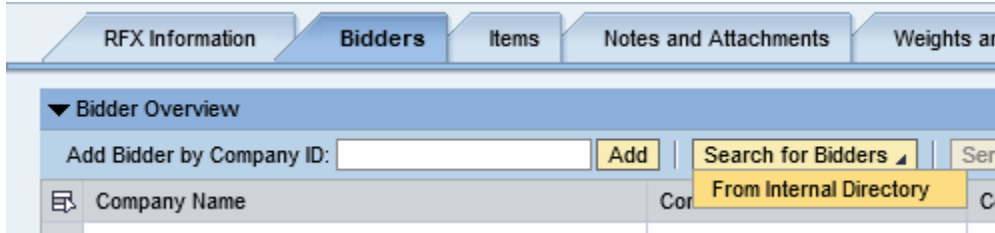
The screenshot displays the 'RFx Parameters' configuration page. The 'RFx Information' and 'RFx Parameters' tabs are highlighted with red boxes. The 'Identification' section includes fields for Name (CM30602550 08/08/2018 16:05), Type (Oversight Appv Reqst), Product Category, and Publication Type (Public RFx). The 'Organization' section includes Purchasing Organization (State of Mississippi - Purchasing) and Purchasing Group (1130 OVSIGHT PSCRB). The 'Dates' section includes Start Date (09/07/2018 12:00:00 am), * Surrogate Bid entry Deadline (10/05/2018 12:00:00 am), Opening Date (10/05/2018 02:00:00 pm), and End of Binding Period. The 'Event Parameters' section includes Currency (USD), Target Value (0.00 USD), Detailed Price Information (No Price), Follow-On Document (Purchase Order or Contract), Bidder Can Change RFx Responses, Allow Multiple RFx Responses for Each Company, Display Weighting to Bidders, * Major Procurement Category, * Sub Procurement Category, * Request Type (Event Parameters), * Bidder Submission Deadline (10/05/2018 10:00:00 am), Electronic Responses Only, Document Builder Doc Type (ZRFX_AMEND), and Confidential Document.

Add Actual Bidders and Publish the RFP/RFO

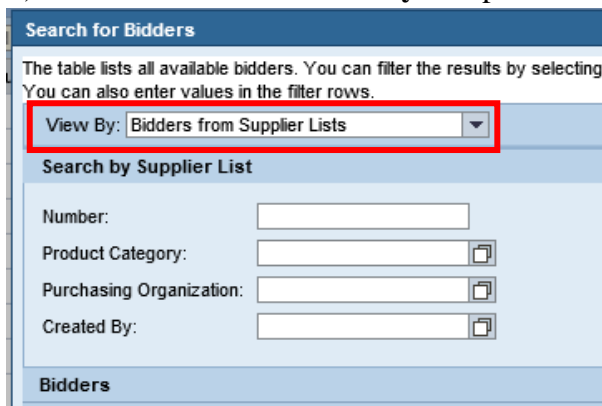
- d.) Click on the **“Bidders”** tab. Enter ALL vendors according to the relevant product category code.



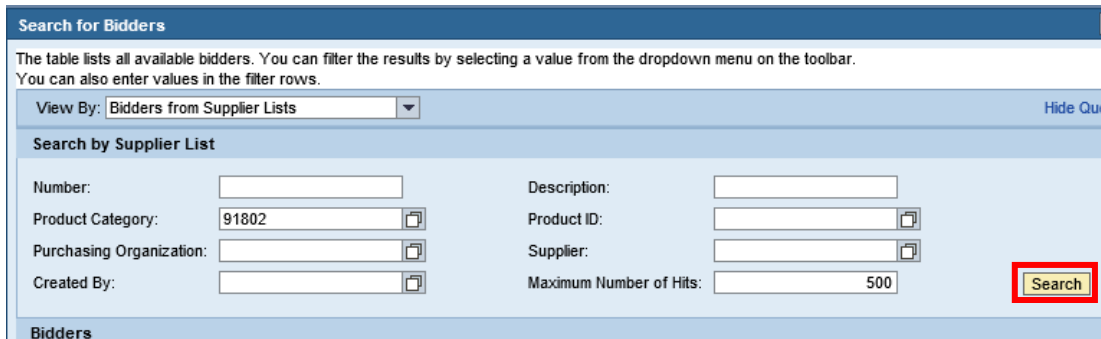
- e.) Click **“Search for Bidders”** and choose **“From Internal Directory”**



- f.) Make sure that the **“View By”** dropdown is set to **“Bidders from Supplier Lists”**



- g.) Enter your NIGP code in the **“Product Category”** field and click **“Search”**



h.) Highlight the product category and click “Add Selected Bidders”

Number	Description	Product Category	Purchasing Organization	Product ID	Supplier Number	Created By
1000003572	91802 - Serv Consult Aud/Vis	91802	SOMS			

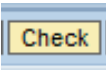

NOTE: This will add all bidders registered to that particular NIGP code in MAGIC to your RFx.

e.) Click on the “Notes and Attachments” tab and **uncheck** the box marked “Keep this attachment internal”. The procurement document **MUST** be visible publicly.

Visible Internally only: Keep this attachment internal

f.) Edit the “Synopsis Description” box to add a note that includes the original “RFx 3180000000” number

Synopsis Description: Pursuant to PPRB Approval for RFx 3180000000, this is a RFP/RFQ to procure ... Services.

- g.) Publish the RFP/RFQ by clicking  first to ensure there are not any errors and to confirm that the solicitation has all relevant information populated and attached, and then click on the  button. The Publish button is only visible in “Edit” mode. After properly submitting, the status should change to “**Published**”.
- h.) To confirm your solicitation accurately published to the procurement portal, please go to https://www.ms.gov/dfa/contract_bid_search/Home/Sell, perform a search for your solicitation and ensure it is displayed correctly.

Congratulations, you have completed the RFP/RFQ submission process!!!