Hawaii State eProcurement HIePRO

Buyer Training

SPO 301 Part B

What Will Be Covered

- A Little About Approval Paths
- Mandatory and Optional instructions
- Review: Submitting a Solicitation on HIePRO
- Creating Addenda to a Solicitation
- Reviewing the Abstract
- Creating an Award
- Summary
- Q&A

About Approval Paths

- A pre-assigned path a solicitation or notice of award will follow for approvals without which they will not be released.
- May contain several levels of approval; (John, Jack, Jill)
- Always sequential: if John does not approve, it is stuck in the approval path, does not move to Jack.
- Created by eAdministrator (who is not psychic most of the time- procedure)
- Approval paths are NOT required.
- Do **not** approve yourself.

Building Approval Paths

Criteria for an Approval Path (Mandatory)

- Function:
  - Solicitation
  - Award
  - Note: approval paths assigned to solicitations are also assigned to addenda; likewise for contract awards and contract amendments.
- Method of procurement:
  - Small purchase request for quote (RFQ);
  - Competitive sealed bidding (IFB);

Building Approval Paths

Optional Criteria for an Approval Path

- Amount Range of cost/award (from - to)
- Note: this only applies to the approval path, not to the ability of the buyer to issue a solicitation or award notice.
  - If an approval path for a solicitation is assigned to a buyer with a range amount of $0 to $100,000, it does not prevent the buyer from issuing a solicitation estimated at $200,000. It will mean that the solicitation will not go through that approval path.

HIePRO Vendor Instructions

Mandatory & Optional

- Two types of vendor instructions in HIePRO:
  - Mandatory - in all solicitations.
  - Optional - buyer must select to include in solic.
    - Admin created- select checkbox.
    - Buyer created - select and complete the text box.
  - Instructions are created by
    - System administrator;
    - Department eAdministrators;
    - Buyer can also create for the specific solicitation.

HIePRO Vendor Instructions

- It is buyers responsibility to understand the mandatory & optional instructions.
  - Buyer is responsible for their solicitation including instructions.
    - Buyer is the point of contact with the vendor.
    - If you don't understand an instruction, ask. Do not send the vendor to find out. Makes the buyer, the office and the department appear unprofessional.

HIePRO Vendor Instructions
Continued

- Do not use optional instructions for items that should be in your specifications, general provisions, special provisions
  - It may not carry the same weight.
- If you have suggestions for optional instructions, contact your eAdministrator.

Vendor Transaction Fee

- Transaction fee is .75% of the award amount or estimated amount.
- Due upon award 30 days net.
- There is a cap of $5,000 per award per vendor.
- Vendor pays the contractor administering HIePRO , Hawaii Information Consortium, LLC (HIC).

Questions?

Let's move on to the HIePRO app

- Quick Review: issuing a solicitation
- Create an addenda;
- Review the abstract;
- Create an award.

Some Reminders
Addenda

- In addition to entering the reason for the addendum, do not forget to modify what needs to be modified.
  - If you are extending the due date and only enter it in the reason, the solicitation will close on the original due date because you have not changed it in HIePRO.

Reminders about Addenda

- Do not use the reason section as the sole place to alter specifications. Enter the modification where you placed the original specs. (For instance: Add an attachment.)
  - It can be confusing if you do not and can be the basis for a protest.
- Remember to extend the submittal due date if the modification to the specs is substantial and the time to the submittal due date is short.

Reminders about Awarding

- Basis of award for both the small purchase request for quote and competitive sealed bidding is to the **lowest priced responsive, responsible offerer**.
- If you need to award based on criteria such as most experienced or other criteria you must the appropriate method of procurement and may not procure in HIePRO.
- Award only if compliant in Hawaii Compliance Express (HCE).

The HIePRO Training site https://training-hiepro.ehawaii.gov/

- Training site is not connected to the rest of eHawaii.gov or the production HIePRO site. You need to create a separate eHawaii.gov account. Use your work email. See instructions under 'Gaining Access.'
- Vendors also use the training site.
  - Do NOT place confidential information on the training site.
  - Be careful what you procure. This is a public site. Whenever releasing a solicitation include a statement that the solicitation/award is for test/training purposes and that no responses should be submitted.

The HIePRO Training Site
Gaining Access

- Go to the HIePRO training site
  - https://training-hiepro.ehawaii.gov/
- Select Log in.
- Select **Create Free ehawaii.gov** account and follow the instructions.
- Once completed, send an email to hiepro@hawaii.gov with the following information:
  - Statement that you have taken the HIePRO training (workshop number and date(s))
  - Your exact email address.
  - Your position title.
  - The department you are in.

State Procurement Office
http://hawaii.gov/spo

Questions?

Coming soon - videos

http://Hawaii.gov/SPO > HePS-HIePRO > HIePRO for State Personnel

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