

## TRANSITION GUIDANCE FROM ORPIN TO OREGONBUYS

*The instructions below give guidance to state agencies on what to expect and how to manage Procurement documents that are in process as we transition from the Oregon Procurement Information Network (ORPIN) to OregonBuys. Over the coming months, ample training will be provided to ensure state agencies know how to accomplish the outlined tasks.*

For more information about what's in scope for the project, visit the project frequently asked questions webpage: <https://www.oregon.gov/das/ORBuys/Pages/agencyfaq.aspx>

### KEY DATES

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#### **ORPIN switches to read-only**

On June 16, 2021, ORPIN moves to read-only status.

#### **Blackout period**

June 16 – 30, 2021 is a blackout period. During this timeframe, no new procurement documents can be processed as ORPIN is in read-only status and OregonBuys prepares for launch. See the Guidance section below for more information about the blackout period.

#### **Optional document preparation week**

June 23 – 30 is an optional OregonBuys document preparation week. If your agency has a Solicitation that needs to go-live immediately on July 1, contact [Adam Helvey](#) to make arrangements.

#### **ORPIN Replacement Go-live**

ORPIN will be replaced with OregonBuys on July 1, 2021. All state agencies and Oregon Cooperative Procurement Program (OrCPP) members will begin using the new system to process Procurement documents and search for Statewide Price Agreements on this date.

### GUIDANCE

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#### **Procurement during the blackout**

From June 16 – 30 the use of ORPIN is blacked out, but Procurement is not:

- Agencies can still do all their internal processes related to requisitions, etc.
- Small procurements can be done - with contracts (PSK) uploaded later in OregonBuys
- All prep work for new solicitations can be done, however posting is delayed
- Emergency procurements can still be done
- Request to DAS can be submitted - PR - Special Requests, etc. outside of the system if it is urgent, etc.
- Evaluations of closed solicitations can continue as can negotiations for new contracts and amendments
- Amendments can be done and posted later
- SPOTS cards can still be used

#### **Emergency Procurements**

- Emergency Procurements, contracts, and purchases are in scope for Phase 1 of the OregonBuys project with no restrictions on the dollar amount.

- Emergency Procurements that are required to be posted are entered as Bid Solicitations in OregonBuys, and their associated Agreements or Contracts are managed as Master Blanket Purchase Orders.
- Emergency requests to DAS are entered as Open Market Requisitions submitted to the DAS “On Behalf Of” organization in OregonBuys. Requests to DAS are in scope for Phase 1.

### **Report access and responsibility for reporting to oversight agencies and the Governor**

State agencies will have access to standard reports in OregonBuys so they can analyze their agency Procurement and purchasing activity. DAS PS will manage and publish report templates for agency use. DAS PS will run and publish reports at the enterprise level and accommodate special report requests for agencies.

## **IN-FLIGHT SCENARIOS**

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### **Purchase requests to DAS PS in the period immediately before and after the transition to OregonBuys**

- Requests not submitted to DAS PS by 6/16/21, must be held and entered by the requesting agency in OregonBuys as of 7/1/21.
- Urgent requests or emergencies during the blackout will be handled outside the system and documented in OregonBuys after 7/1/21.
- In progress purchase requests already sent to DAS PS before 6/16/21 — DAS PS will recreate in-process purchase requests in OregonBuys with a reference to the ORPIN document number.

### **New and existing Opportunities in ORPIN with a Close date after 6/16/21**

- All new and existing Opportunities must Close by 6/16/21.

### **Notices posted in ORPIN with Close dates beyond 6/16/21**

- All Notices in ORPIN must Close before 6/16/21.

### **Multi-phase Procurements started in ORPIN that haven’t reached their final Close dates**

- The current phase of a multi-phase Opportunity posted in ORPIN must Close before 6/16/21.
- For subsequent stages of the Multi-phase Opportunities – agency staff must create the Opportunity as a new Bid Solicitation in OregonBuys and restrict it to the vendors who are advancing to the next round.

### **Opportunities in ORPIN that will Close by, but won’t be awarded by, 6/16/21**

Agency staff must create as a new Bid Solicitation in OregonBuys for Opportunities that Close but won’t be awarded by the blackout as follows:

If Intent to Award isn’t issued yet in ORPIN, include all vendors in the OregonBuys Bid Solicitation.

If the Intent to Award is issued, but the Award isn’t complete in ORPIN, only include the vendor that will be issued the Intent to Award to in the OregonBuys Bid Solicitation. Then award the Bid Solicitation in OregonBuys.

### **Existing contracts with end dates after 7/1/21**

- Active statewide contracts will be migrated to OregonBuys.
- Agency Core Teams will review active agency contracts with end dates after 7/1/21 during “To Be” process sessions. These sessions will determine which agency contracts will be loaded into OregonBuys.

## **Historical Contracts not yet entered in ORPIN that have renewals or amendments extending the end date beyond 6/16/21**

All Contract renewals and amendments must be processed in ORPIN before 6/16/21. If the contract and its renewal or amendment information isn't entered in ORPIN by the time the agency populates their contract upload template, it won't migrate to OregonBuys.

## **Contracts not in ORPIN that start after 6/16/21**

Agency staff must create future contracts as new Master Blanket Purchase Orders in OregonBuys on or after 7/1/21.

## **Amendments to existing contracts before and after 6/16/21**

- Amendment activity on existing contracts must be entered in ORPIN before 6/16/21.
- Amendments that happen during the blackout period (6/16 - 6/30) must be held and manually entered by agency staff in OregonBuys after 7/1/21.

## **Attachments in ORPIN**

Attachments will not automatically move from ORPIN to OregonBuys. Agency staff are responsible for manually uploading attachments in OregonBuys. We'll provide more guidance on this process during core team sessions.

## **ORS 190 intergovernmental and interagency agreements**

- Active ORS190's with a date extending past 7/1/21 will be migrated to OregonBuys in an "In Progress" (aka draft) state as part of the agency's active contract upload work. State agencies will then have from 7/1 – 12/31 to work on validating the drafts and take them to a final "Sent" status after manually adding any additional required data or attachments (such as attachments from ORPIN).
- ORPIN will contain the active version of the ORS190 (while agencies work to take drafts to "Sent" status) and can be used for searching/reporting.
- If an existing ORS190 is revised or amended, agency must complete "In Progress" draft in OregonBuys immediately and include revision/amendment information.
- New ORS190s issued after the agency submits their contract upload template on May 7 must be manually entered in OregonBuys after Go-live.

## **Special Requests to DAS**

- Special Requests draft in ORPIN but not yet sent to DAS as of 6/16/21 — agency staff must create a new Open Market Requisition in OregonBuys beginning 7/1/21.
- New Special Requests after 7/1/21 — agency staff must create a new Open Market Requisitions in OregonBuys.
- Amendments or extensions to Special Requests previously submitted to DAS — must be sent to DAS in ORPIN prior to 6/16/21, otherwise agency staff must create a new Open Market Requisition in OregonBuys with a reference to the original Special Request document number in ORPIN.

## **Work Order Contracts (WOC) and related reporting for Personal Services WOC's in Phase 1**

Agency staff must enter as a Master Blanket Purchase Order in OregonBuys and then attach the WOC to the Master Blanket Purchase Order.

*\*ODOT instructions may differ*