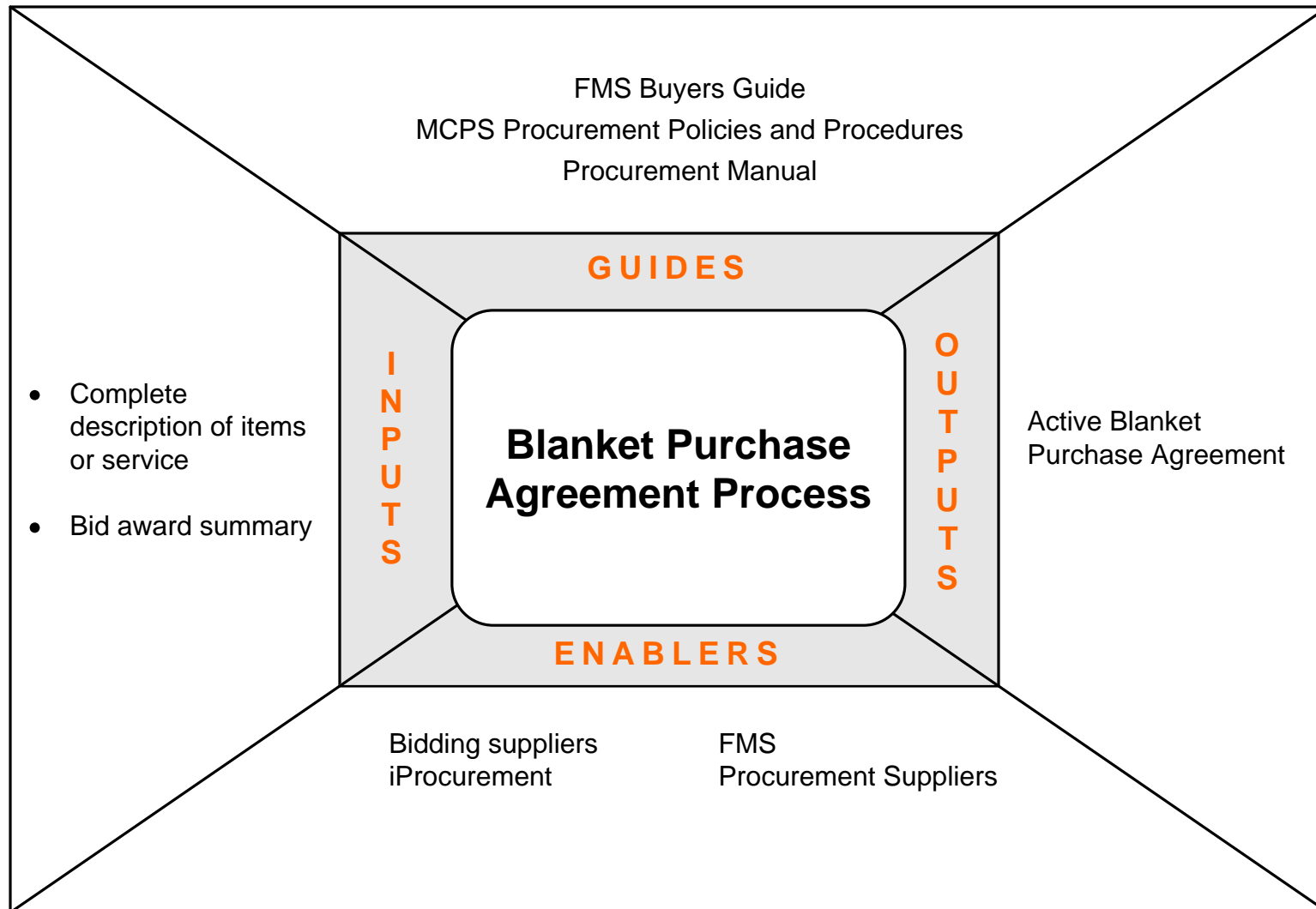


Process Begins when

the delivery schedule of needed goods or services is unknown.

Process complete when

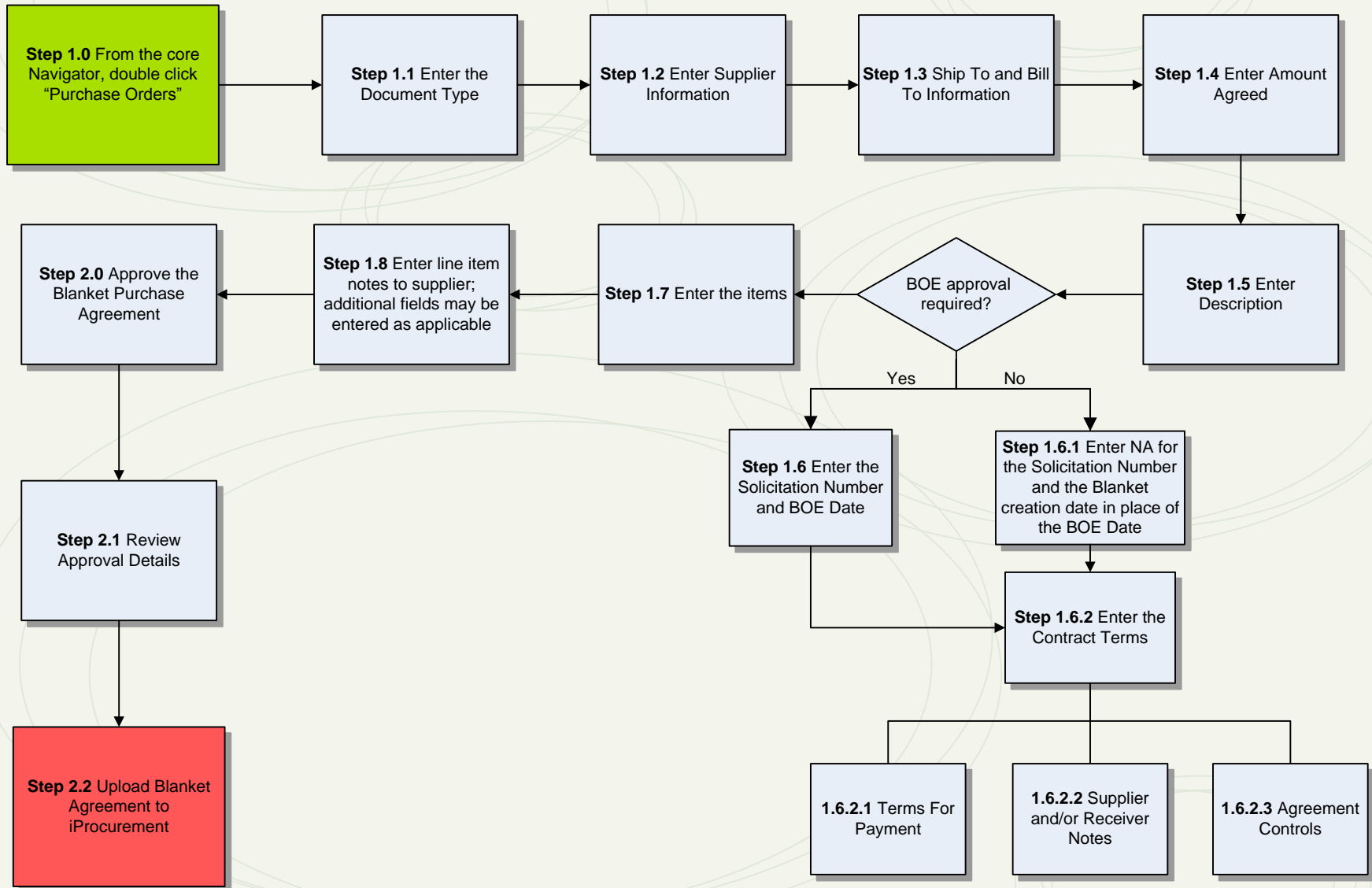
blanket items are made available for end user purchases.




Performance Measures



Blanket Purchase Agreement Process



 To Details

 Return to IGOE

Blanket Purchase Agreement Process

INTRODUCTION

A Blanket Purchase Agreement (BPA) is created for equipment, supplies and contractual services when the dollar threshold exceeds the established guidelines requiring a competitive bid. (See the Procurement Manual for detailed information at the following link:

http://www.montgomeryschoolsmd.org/departments/materials/miscellaneous/procurement/Feb_2007_Procurement_Manual_no_reg_links.pdf).

BPAs are used when the equipment, supplies or services are known, as well as the quantities/dollar amounts and delivery schedules. A BPA is prepared containing the specific goods/services and quantities at the negotiated prices to the awarded supplier for the specific time frame prior to purchasing items. When the goods/services are ordered in iProcurement, a Blanket Release (BR) is created against the agreement and a release number is assigned.

PROCESS DESCRIPTION

Step 1.0 Enter Award Information

Through the Navigator open the Purchase Orders window to enter the relevant Blanket Purchase Agreement information that follows.

NOTE: Determine whether supplier exists in FMS prior to creating the BPA. (See [Supplier Data Entry Process](#) for detailed information if supplier needs to be added.)

Step 1.1 Enter the Type

Change the Type from the default of Standard Purchase Order to Blanket Purchase Agreement.

Step 1.2 Enter Supplier Information

In the Supplier, Site and Contact fields, enter the name of the supplier as it exists in FMS, the corresponding site that the blanket releases will be sent to and the contact person for orders.


NOTE: A partial value may be entered and hit the Tab key to automatically populate fields.

Step 1.3 Ship To and Bill To Information

The Ship To field defaults to Materials Management. If there will be multiple ship to locations, change this field to read "See Delivery Addresses Below". If there will be one ship to address, change accordingly.

The Bill To field defaults to Division of Controller's address. If there is an exception to this, change accordingly.

 To Details Page 2

 Return to Key Process

Step 1.4 Enter the Amount Agreed

Enter the total dollar amount of the goods/services that are expected to be purchased for the contract term in the Amt Agreed field.

Step 1.5 Enter the Description

In the Description field at the header level, enter a description to identify the Blanket Purchase Agreement.

Step 1.6 Enter the Board Approval Information

The Award No and the BOE Original Approval Date fields located in the descriptive flex field are required fields. However, some BPAs may not require BOE approval when the total dollar amount of purchases falls below the dollar threshold requiring BOE approval.

Step 1.6.1 Enter the Board Approval Information

On the right side of the Purchase Orders form next to the Released field, click the descriptive flex field to open the PO Headers window. In the Award No field enter the solicitation number. If Board approval was not required, enter NA. In the BOE Original Approval Date field enter the first day of the month in which the contract was approved by the BOE. If Board approval was not required, enter the current date. Click OK to close the PO Headers window.

Step 1.6.2 Enter the Contract Terms and Agreement Controls

Click the Terms button to open the Terms and Conditions window.

Step 1.6.2.1 Enter the Terms

In the Terms parameter of the window the Payment and Freight fields are automatically populated. Change, if applicable.

Step 1.6.2.2 Enter Supplier and/or Receiver Notes


Enter any corresponding notes, if applicable.

Step 1.6.2.3 Enter the Agreement Controls

In the Effective fields enter the contract beginning and end dates. The Amount Limit defaults from the dollar amount specified on the Amt Agreed field that was entered at the header level. Enter a Minimum Release, if applicable. Click Save and close the Terms and Conditions window.

Note: The Minimum Release amount represents the minimum total amount for a release placed against the BPA. It is not recommended to use this field at this time.

 To Details Page 3

 Return to Key Process

Step 1.7 Enter the Items

Enter the information for the goods/services awarded under the Blanket Purchase Agreement to include **Type, Item** (warehouse item number), **Category, Description, UOM**, and **Price** (negotiated unit price).

Determine whether there may be tier pricing (price breaks) for item(s); supplier item numbers; or ISBN numbers. If there are, enter as applicable.

Step 1.8 Enter Item Notes to Supplier

If a note to the supplier pertaining to specific item(s) is needed it may be added at the line level for each line and appear on the Blanket Releases. Click on the More tab and enter the note in the Note To Supplier field.

Step 2.0 Approve the Blanket Purchase Agreement

Click the Approve button to open the Approve Document window.


Step 2.1 Review Approval Details

Verify that the Submit for Approval check box is checked. If the Blanket Purchase Agreement does not need to be transmitted, remove the mode of transmission.

Step 2.2 Upload Blanket Agreement to iProcurement

Click on the Additional Options tab to activate the Automatic Sourcing Setup. Check the boxes for Enable Automatic Sourcing and Update Existing Sourcing Rule and Assignment. Choose either Automatic Release/Review or Release Using Autocreate. Click OK to approve and upload item(s) to iProcurement.

NOTE: All BPAs are Automatic Release/Review at this time.

 [Return to Key Process](#)