



COMMBUYS Use Policy for Purchasing Organizations

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1 EXECUTIVE SUMMARY

Effective March 24, 2014, the Commonwealth's new market center, COMMBUYS, will replace the current Comm-PASS procurement system. COMMBUYS will automate all procurement functions into a single solution. The system enables electronic ordering through Statewide and Departmental vendor catalogs that will yield important purchasing data to be used to track contract spending, aggregate future purchases, analyze purchasing patterns and trends, and will provide opportunities for Statewide Contracts to improve responsiveness to public purchasing entity needs.

The introduction of COMMBUYS does not change the fundamental legal and regulatory requirements for state finance, procurement and records management, but COMMBUYS will provide Departments a new tool to achieve additional efficiencies, improve service continuity, and organize records while complying with the laws and regulations that exist.

This document will set forth the policies applicable to:

- Executive Departments, which are subject to the Operational Services Division (OSD)'s procurement regulations and policies,
- Non-Executive Departments, Legislative and Judicial Branches, Cities, Towns and other eligible public entities, which are not subject to OSD's procurement regulations and are not required to use the system but who choose to do so at their own option.

COMMBUYS is being implemented in phases, each making a specific set of functions available to the COMMBUYS community. In Phase 1, beginning March 24, 2104, COMMBUYS will be utilized to conduct procurement activities and make purchases. During Phase 2, which will occur later this year, COMMBUYS will interface with the Massachusetts Management Accounting and Reporting System (MMARS). Upon implementation of the COMMBUYS/MMARS Interface, this Policy will be revised to address additional activities, including billing and payments for orders placed through COMMBUYS by Executive Departments.

The implementation of this policy will also be gradual, with some provisions going into effect on COMMBUYS go live date and the full policy on July 1, 2014:

- Effective March 24, 2014, COMMBUYS will replace Comm-PASS for posting solicitations, notices and contracts. In addition, Statewide Contracts will be enabled with catalogs in the system, and Executive Departments will be required to place orders from Statewide Contracts with catalog line items through COMMBUYS. We understand that Executive Departments need to continue serving customers while they adjust to using the new system. To allow for this, we strongly encourage Executive Departments to place orders for items available in COMMBUYS catalogs through the system. If an item is not available in a COMMBUYS catalog, Executive Departments should follow current policies and procedures to obtain the item outside of the system and then record the purchase in COMMBUYS after the fact.
- Effective July 1, 2014, Executive Departments will be required to comply with all parts of this policy.

In addition, effective July 1, 2014, ordering from Statewide Contracts by **all** eligible entities will be performed through COMMBUYS. Non-Executive Departments, Legislative and Judicial Branches, Cities, Towns and other eligible public entities, who take advantage of Statewide Contracts, are encouraged to create COMMBUYS accounts and begin using it to place orders as soon as possible after the system becomes available. While the system will also be available for their use to create solicitations and contracts of their own, these entities are not required to do so.

On an ongoing basis, OSD will provide training and resources to both purchasers and sellers in order to transition to the new system. A wide range of training materials and resources, including COMMBUYS readiness workbooks, glossaries, fact sheets and webcasts, are located in the [COMMBUYS Resource Center](#).

2 POLICY STATEMENT

The Operational Services Division (OSD) oversees and issues policies for the procurement of commodities and services by Commonwealth entities in accordance with [MGL c. 7, s. 4A\(a\)](#), [MGL c. 7, s. 22](#), [MGL c. 30, s. 51](#) and [MGL c. 30, s. 52](#) and [801 CMR 21.00](#). Pursuant to its authority to oversee “the manner and method of the purchasing, delivering and handling of, and the contracting for, supplies, equipment and other property,” OSD utilizes COMMBUYS, a web-based market center, which replaces the Comm-PASS (Commonwealth Procurement Access & Solicitation System) bid solicitation system.

2.1 Applicability

2.1.1 Executive Departments

Executive Departments subject to 801 CMR 21.00 are required to utilize the guidelines contained in this document for conducting the activities defined herein. These Departments are identified in the Office of the Comptroller (CTR) and OSD’s [State Finance Law and General Requirements](#) Policy as Level III Departments.

Use of COMMBUYS is required, unless specified otherwise, for:

1. **Creating requisitions** to initiate activity in the system.
2. **Posting of all solicitations for goods and services**, Departmental and Statewide, including:
 - a. Small Procurements (\$10,000-\$150,000);
 - b. Large procurements (>\$150,000);
 - c. Purchases through existing Statewide or Departmental Contracts, including Requests for Quotes.
3. **Recording outcomes of activities associated with procurement exceptions**, which may be entered into the system after the purchase has taken place, including:
 - a. Legislative exemption;
 - b. Emergency contracts;
 - c. Collective purchases;
 - d. Interim contracts;
 - e. Incidental purchases (up to \$10,000).
4. **Notification postings**, including:
 - a. World Trade Organization (WTO) Intent to Post;
 - b. Due Diligence Posting Notices.
5. **Receiving electronic responses.**
6. **Awarding contracts**, Departmental and Statewide, and, once awards are made, creating electronic catalogs of goods and/or services that will be used to place orders through COMMBUYS.
7. **Conducting Requests for Quote (RFQ) and ordering from Departmental and Statewide Contracts.**

The introduction of COMMBUYS does not change the legal and regulatory requirements for the above-mentioned transactions. COMMBUYS will provide Departments a new tool to achieve efficiencies, improve service continuity, and organize records while complying with the laws and regulations that exist.

2.1.2 Other Eligible Purchasing Organizations

Some purchasing organizations that are not Executive Departments are required by law, regulation or policy to make postings on COMMBUYS as the official successor of Comm-PASS (e.g. Non-Executive Departments procuring Capital IT Projects pursuant to the [Enterprise Information Technology Acquisition Policy](#)). Other organizations that are not required to use COMMBUYS are encouraged to do so and may use it at their own option.

The use of COMMBUYS is not required for, and this policy will not apply to, Non-Executive Departments, Legislative and Judicial Branches and other Exempt Departments (identified in the joint CTR/OSD [State Finance Law and General Requirements](#) Policy as Level I and II Departments), and all other eligible purchasing organizations within Massachusetts borders. However, should any of these organizations choose to use statewide contracts and/or the system, the following provisions of this policy will apply:

- **Using COMMBUYS to order from Statewide Contracts.** Effective July 1, all ordering from Statewide Contracts will be performed through COMMBUYS. As a result, if such a Non-Executive Department or other entity wishes to purchase through a Statewide Contract, they will be required to use COMMBUYS to do it. While the system is available for use to develop solicitations and contracts, these entities they are not required to do so.
- **Using COMMBUYS for procurement and purchasing activity beyond Statewide Contracts.** Non-Executive Departments and other eligible organizations wishing to use COMMBUYS as their procurement system (e.g. post solicitations, award contracts, place orders, etc.), or choose to follow 801 CMR 21.00, must comply with the sections of this policy that govern those aspects of the system utilized. In using COMMBUYS, these organizations are responsible for ensuring compliance with the statutes, regulations and internal policies that apply to their procurement activities. Adhering to this policy while using the system will ensure that all organizations using COMMBUYS do so in a consistent, secure and efficient manner and in compliance with applicable laws and regulations.

As used throughout this document, “Departments” refers to both Executive Departments and those other eligible organizations that have opted to utilize a particular aspect of system functionality. The full list of types of organizations eligible to use the system is provided in Section 3.3, Account Creation.

2.2 COMMBUYS System Terminology

COMMBUYS utilizes a set of terms and processes that differ from those used in the Comm-PASS system and will be used throughout this document. A COMMBUYS Terminology Crosswalk and a glossary of terms to guide users can be found in the [COMMBUYS Resource Center](#).

2.3 Phased Implementation and Amendments

The development of COMMBUYS will be completed in three phases. This policy is being issued primarily for Phase 1 and will be implemented gradually as noted below:

2.3.1 Phase 1 – Base System Rollout

Effective March 24, 2014, COMMBUYS will open for business. Departments will be required to use COMMBUYS to set up internal Departments and Locations, user roles and approval paths.

- **COMMBUYS will replace Comm-PASS for posting solicitations and notices**, such as the World Trade Organization Intent to Post, all of which COMMBUYS refers to as Bids. It is recommended that Departments require Sellers to submit electronic responses (Quotes) through COMMBUYS, but Departments will be allowed to utilize previously-drafted RFRs without amending them to add that requirement.
- **COMMBUYS will replace Comm-PASS for posting contracts**, which COMMBUYS refers to as Master Blanket Purchase Orders (MBPOs). All new contracts awarded in COMMBUYS must comply with this policy, but Departments will be allowed to bring existing contracts into compliance by July 1.
- **Statewide Contracts will be catalog-enabled in COMMBUYS.** Departments will be required to create requisitions and place their orders for Statewide Contract purchases through COMMBUYS. OSD understands that Executive Departments need to continue serving customers while they adjust to using the new system. To allow for this, OSD strongly encourages Executive Departments to place orders for items available in COMMBUYS catalogs through the system. If an item is not available in a COMMBUYS catalog, Executive Departments should follow current policies and procedures to obtain the item outside of the system and then record the purchase in COMMBUYS after the fact. It is also recommended that Departments use COMMBUYS to solicit quotes where recommended or required by the Statewide Contract, but offline quotes will also be acceptable as long as the order is entered and submitted through COMMBUYS.

Effective July 1, 2014, Executive Departments will be required to comply with all parts of this policy.

Note for entities other than Executive Departments:

- All entities other than Executive Departments, who take advantage of Statewide Contracts, are encouraged to create COMMBUYS accounts and begin using it to place orders as soon as possible after the system is available. It is important for all entities that use Statewide Contracts to register and train in COMMBUYS before July 1, 2014, when all orders from Statewide or Department contracts must be placed through COMMBUYS. More information is available in the Readiness Workbook for Non-Executive Departments in the [COMMBUYS Resource Center](#).

2.3.2 Phase 2 – MMARS Interface

Implementation information for this phase will be added at a later date.

2.3.3 Phase 3 – Custom Reporting and Analysis

Implementation information for this phase will be added at a later date.

2.3.4 Amendments

This policy will be amended from time to time to reflect additional COMMBUYS functionality and to improve the use of the system.

3 COMMBUYS ORGANIZATION AND USER ROLES

Executive Departments will each have a single “Organization” COMMBUYS account, which will be managed by the Department’s Organization Administrator. Upon implementation, the Organization Administrator will create individual user accounts and assign the appropriate role(s) for each user.

3.1 Public Access vs. Authenticated Access

COMMBUYS will provide no-cost public access to view solicitations (Bids) and contracts (Master Blanket Purchase Orders) without a Seller or Purchaser registration or log in. However, Sellers and Purchasers are required to obtain login credentials for the system in order to use all other functions, including:

- A **Seller** account (for vendors) is required for any transaction, including but not limited to acknowledging receipt of a bid, submitting an electronic quote in response to a bid, and receiving a purchase order. Therefore, vendors seeking to do business with your Department should be instructed to register in COMMBUYS.
- A **Purchaser** account (for buyers, procurement or purchasing staff) will be required to view contract catalogs, order from an existing contract (including Statewide Contracts), issue a bid, accept and evaluate electronic responses, create a contract, place orders, and other transactions. The range of functions available to registered system users will expand in future phases of the project.

3.2 COMMBUYS Organizational Levels

All activities in COMMBUYS performed by each Department’s respective users will occur within the Department’s COMMBUYS account. Every user and document within COMMBUYS must be associated with a particular business unit, with the business units organized in three hierarchical levels:

- **Organization** (all Departments will be set up as Organizations),
- **Department** (Divisions, institutions, programs and units within each Organization), and
- **Location** (more discrete areas within each Department, such as offices, branches and sections).

For users, these associations control which business units within the Executive Department they can conduct procurement activity on behalf of and which documents and addresses users can access. For documents, these associations are used to route approval paths and drive reporting data.

Departments must designate at least two individuals to serve in the Organization Administrator role in order to ensure back-up and continuity of service. While such individuals do not have financial responsibilities within the system, they must be familiar with and follow CTR’s [Department Head Signatory Authorization \(DHSA\) and Electronic Signatures for MMARS Transactions Policy](#) in the

assignment of other users' roles and document approval paths. It is recommended that the Department's MMARS Security Officer serve as one of the Organization Administrators.

Any requests to change the Organization must be initiated by the Department's Organization Administrator by contacting the COMMBUYS Help Desk at commbuys@state.ma.us and are subject to OSD approval.

3.3 Account Creation

The following types of purchasing organizations are eligible to create accounts in COMMBUYS:

- Executive, Legislative and Judicial Branches, including all Departments and elected offices therein, and public institutions of higher education;
- Independent public authorities, commissions and quasi-public agencies;
- Cities, towns, districts, counties and other political subdivisions;
- Local public libraries, public school districts and charter schools; and
- Public hospitals owned by the Commonwealth.

Additional Organization accounts may be requested by individuals with the signatory authority for purchasing on behalf of such organizations, or those individuals' designees. Such requests must be sent to the COMMBUYS Help Desk at commbuys@state.ma.us and are subject to OSD approval.

At the time of account creation, signatory authorities will agree to the COMMBUYS Agreement and Terms of Use for Organizations, which may be accessed in the [COMMBUYS Resource Center](#). In addition, at the time of login, each user will agree to the COMMBUYS Agreement and Terms of Use for Purchasers, which will also be available in the [COMMBUYS Resource Center](#).

3.4 Purchaser Roles

Every user with login access to COMMBUYS must have at least one role. Roles determine the purchasing and administrative functions a user is able to access. Each Department is required to assign to authorized users one or more of the following roles (in the order of increasing level of responsibility and access).

Role Name	Activities Enabled by the Role
Inquiry	<ul style="list-style-type: none"> • Review procurement and system data • No ability to create or modify documents
Department Access	All activities available to Inquiry role (above) and: <ul style="list-style-type: none"> • Create requisitions • Approve documents • Receive items • Manage informal bids • Issue limited dollar purchase orders
Basic Purchaser	All activities available to Department Access role (above) and: <ul style="list-style-type: none"> • Process requisitions • Conduct formal bids

Role Name	Activities Enabled by the Role
	<ul style="list-style-type: none"> • Manage contracts (Master Blanket Purchase Orders) • Issue purchase orders
Organization Administrator	<p>All activities available to Basic Purchaser role (above) and:</p> <ul style="list-style-type: none"> • Create and manage the organization’s user profiles • Manage approval paths (workflow) • Manage the organization’s business units and addresses • Manage procurement documents, including common/standard forms and templates used within the organization • Manage users’ access to reports and reporting tools

For Executive Departments, Purchaser roles associated with the approval of Release Requisitions, Purchase Orders (including Master Blanket Purchase Orders) and Change Orders must align with Security Roles assigned in MMARS, in order to comply with CTR’s [Department Head Signatory Authorization \(DHSA\) and Electronic Signatures for MMARS Transactions Policy](#). The system will provide Departments additional flexibility to adjust each individual user’s role, including but not limited to the ability to view documents outside the user’s own Location, maximum amounts for requisitions, ability to approve documents, etc.

3.5 Role Qualifications and Prerequisites

During Phase 1 of the project (Base System Rollout), user roles and prerequisites must be based on the Department’s current purchasing roles and permissions. In Phase 2 of the project (MMARS Interface), OSD and CTR will establish and maintain a set of additional qualification requirements for system users. Whenever questions regarding user role qualifications and prerequisites arise, Departments’ Organization Administrators must contact the COMMBUYS Help Desk at commbuys@state.ma.us to request clarification.

The COMMBUYS Agreement and Terms of Use for Organizations, available in the [COMMBUYS Resource Center](#), require that Organization Administrators receive appropriate training prior to gaining access to the system. Departments are responsible for assessing the training needs of other system users and referring them to OSD’s training resources (see the [COMMBUYS Resource Center](#) for additional information on job aids, recorded webcasts, webinars and in-person training).

3.6 Approval Paths

Approval Paths are preset paths for documents, such as Requisitions, which require approvals. Approval paths must be set by the Organization Administrator. They attach to documents automatically and may be based on one or more of the following criteria:

- The business unit (COMMBUYS Department or Location) originating the purchasing request
- The dollar amounts (or estimated dollar amounts) of the items being purchased or procured
- The commodity code(s) associated with the item(s) being purchased or procured
- The stage of the purchasing/procurement process, by document type:
 - Requisitions – the request to purchase goods or services

- Bids – the Bid prior to publishing for vendor response
- Bid Award Recommendations – prior to contract award/negotiation
- Purchase Orders (PO) and Contracts (Master Blanket Purchase Orders), prior to being “sent” to vendors
- Change Orders, prior to applying them to a PO or Contract

Executive Departments must ensure that all documents that may result in financial obligations for the Commonwealth receive appropriate approval pursuant to CTR’s [Department Head Signatory Authorization \(DHSA\) and Electronic Signatures for MMARS Transactions Policy](#). To that end, approval paths established by Departments must, at a minimum:

- Cover all Release Requisitions, Purchase Orders (including Master Blanket Purchase Orders) and Change Orders;
- For the above-mentioned documents, cover the full range of amounts handled by COMMBUYS, from \$0.01 to \$9,999,999,999.99; and
- Include approval by an individual authorized to approve encumbrances in MMARS.

3.6.1 Proxies

Department Approvers, with the approval of the Organization Administrator, are allowed to set up proxies to ensure timely approval of documents. Purchasers in proxy roles must have the same (or greater) level of permissions as the individual on whose behalf the proxy will be performing tasks. Proxies involved in the approval of financial transactions must have signatory authority for the Department in accordance with the DHSA policy above. COMMBUYS retains an audit trail of all transactions and their work flow.

3.6.2 Access for Team Members from Outside the Organization

COMMBUYS contains a set of tools that allows for procurement/sourcing team members to collaborate in the creation of requisitions, bids, bid tabulations or contracts. While the default list of such team members is drawn by the system from within the organization, Departments, through their Organization Administrator, may choose to enable employees of other Organizations in COMMBUYS to participate in collaborative work. In such cases, Departments must establish agreements with each team member in order to:

- Define the scope of the individual’s responsibilities within the system;
- Prevent potential conflicts of interest;
- Ensure the security of sensitive and personally identifiable information;
- Require that the individual execute a non-disclosure agreement; and
- Address any additional risk and liability issues.

Departments must use the [Strategic Sourcing/Procurement Management Team Membership Terms](#) available on the [OSD Forms](#) page as the basis of such agreements. Once a Team Membership Agreement has been signed, Departments may create a temporary, independent account within their own organization to enable the team member to participate. Organization Administrators must monitor

such temporary accounts and deactivate them at the conclusion of the team member’s participation in the procurement.

4 DOCUMENTS IN COMMBUYS

4.1 Document Types and Statuses

COMMBUYS uses several document types, each one associated with a specific part of the sourcing process.

4.1.1 Requisitions

Requisitions are internal documents used to initiate several types of transactions in COMMBUYS. A requisition may be used as a request to purchase an item from an existing contract, as the first step towards building a new competitive procurement, or as a means of entering a purchase that has already taken place. Appropriate uses for the specific requisition types are described below, and specific policy requirements are set in Section 5, Initiating Purchases in COMMBUYS.

Requisition Type	Used for	Created by	Turns into
Open Market	Initiate a one-time purchase of non-contract commodities/services (e.g. incidental purchase), or a competitive procurement.	Department Access, either as a new document or by copying a previous requisition	Open Market Purchase Order or Bid
Release	Purchase of contract commodities/services, including Departmental and Statewide Contracts.*	Department Access, either as a new document or by copying a previous requisition	Release Purchase Order or Bid
Request for Payment Authorization (RPA)	Document a purchase after the fact based on authorization outside of COMMBUYS (e.g. emergency purchase).	Department Access, either as a new document or by copying a previous RPA	RPA Purchase Order

* Release Requisitions with the “solicitation enabled” option selected will enable Department to solicit quotes from vendors on Departmental and Statewide Contracts.

4.1.2 Purchase Orders (PO) / Master Blanket Purchase Orders (MBPO)

Purchase Orders serve several purposes within COMMBUYS, from transmitting orders to Sellers (Open Market and Release POs) to documenting contracts (Master Blanket Purchase Orders). Appropriate uses of each type of purchase order in the system are described below, and specific policy requirements are set in Section 8, Creating Contract Records in COMMBUYS, and Section 9, Purchasing from Existing Contracts.

PO Type	Used for	Created by
Open Market	One-time purchase of non-contract commodities/services (e.g. incidental purchase).	Basic Purchaser, either as a new document, or by converting Requisitions or Bids, or by copying a

PO Type	Used for	Created by
		previous PO.
Release	Purchase of contract commodities/services, including Departmental and Statewide Contracts.	Basic Purchaser by converting an approved Release Requisition.
Master Blanket Purchase Order (MBPO)	Capture contract agreements and allow for the processing of Release Requisitions against them for the life of the contract.	Basic Purchaser either as a new document, or by converting a Bid award or a requisition, or by copying a previous PO.
Request for Payment Authorization (RPA)	Document a purchase after the fact based on authorization outside of COMMBUYS (e.g. emergency purchase).	Automatically generated by an approved RPA requisition resulting in a "Sent" PO and an in-progress Invoice.
Contract – Not for Commonwealth Use	While visible in the system, Contract POs will not be used by the Commonwealth.	Contract POs should not be created.

4.1.3 Bids

COMMBUYS refers to solicitations as Bids and provides for the following important bid attributes:

4.1.3.1 Open versus Closed

Open Bids are those that allow any Seller registered in COMMBUYS to submit a response. They are viewable by any interested Seller without logging in. COMMBUYS does not notify Sellers of bids matching their business interests automatically. Departments must take appropriate action to notify **all** Sellers who registered in COMMBUYS with commodity codes matching the commodity codes used in the Bid. Open bids should be used for all procurements unless they fall into one of the situations listed below as appropriate for Closed Bids.

Closed Bids are visible only to the vendors originally notified of the bid by the Department upon publication. Only those vendors will be able to submit a quote in response to a closed bid. A closed bid option is appropriate only in limited circumstances when a public bid is not required. For example, this option is appropriate for issuing bids (Requests for Quotes) against Statewide and Departmental Contracts, where the pool of eligible vendors is already established.

4.1.3.2 Formal versus Informal

Formal Bids do not allow Purchasers to view responses until the Opening Date/Time (i.e. Bid Submission Deadline) identified in the bid. Bids are formal by default, and no action is required to make them formal. This option should be used for all bids unless they fall into one of the situations listed below as appropriate for Informal Bids. Formal bids may be Open or Closed.

Informal Bids allow Purchasers to view responses prior to the Opening Date/Time. Informal bids allow for quotes to be evaluated upon receipt and may be used only in limited circumstances for issuing bids (Requests for Quotes) against Statewide and Departmental Contracts, rolling enrollment solicitations, and bidder pre-qualifications. Informal bids may also be Open or Closed.

4.1.4 Other Document Types

Departments must be aware of other document types used in COMMBUYS, including but not limited to:

- **Quotes**, which are responses submitted by Sellers in response to Bids;
- **Bid Tabulations**, which are records of Quote evaluation;
- **Amendments**, which are records of changes made to Bids; and
- **Change Orders**, which are records of changes made to Purchase Orders.

Specific policies related to these document types are described further in this document. Additional document types will be added to the system in Phases 2 and 3 of the project.

4.1.5 Document Status

COMMBUYS automatically assigns each document a status, which denotes the document's progression in the workflow. Statuses that are similar across document types include "In Progress" (draft), "Ready for Approval" (submitted to the approver), "Returned" (rejected by the approver), "Sent" (sent to the vendor or published), and "Cancelled."

4.2 Document Publication Standards

4.2.1 Document Accessibility Standards

Any documents posted on COMMBUYS must meet the Commonwealth's [Web Accessibility Standards](#). Departments requiring information on the use of PDF and compressed files will find it as part of the Web Accessibility Standards' [Section 4, Content Requiring Additional Software](#).

4.2.2 Forms and Attachments

On COMMBUYS go live date, OSD will provide all Departments access to standard procurement forms and attachments within COMMBUYS (e.g. the Standard Contract Form and Instructions, Commonwealth Terms and Conditions, etc.). In addition, Departments may use COMMBUYS to store additional forms and attachments for use in their Organization's Bids, MBPOs and POs. Departments will be responsible for ensuring that their libraries of forms and attachments in COMMBUYS contain up-to-date versions of all forms. The latest versions of standard Commonwealth forms are available on the [OSD Forms](#) page.

4.2.3 Security-Sensitive and Private Content

Departments are responsible for ensuring all posted file attachments are void of security-sensitive or private information as specified under applicable laws, regulations, or executive orders, including but not limited to Health Insurance Portability and Accountability Act (HIPAA) ([45 CFR Parts 160, 162, and 164](#)); Massachusetts Public Record laws ([MGL c. 4, § 7, cl. 26](#); [MGL c. 66, § 10](#)); Fair Information Practices Act (FIPA) ([MGL c. 66A](#)); Security Breaches ([MGL c. 93H](#)); Disposition and Destruction of Records ([MGL c93I](#)); or [Executive Order 504](#).

4.2.3.1 Security-Sensitive Information

Departments must avoid public disclosure of specific security solutions, building plans depicting locations of security cameras, blueprints, plans, policies, procedures and schematic drawings, which relate to internal layout and structural elements, security measures, emergency preparedness, threat or

vulnerability assessments, or information which, if disclosed, may pose a risk to the Commonwealth information technology, or any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation or other infrastructure located within the Commonwealth. Such information is generally exempt from public disclosure under the Commonwealth’s public records law and should be safeguarded by Departments when possible. See [MGL c. 4, § 7, cl. 26\(n\)](#).

4.2.3.2 Personal/Private Information

Departments must avoid public disclosure of personal information, as defined in M.G.L. c. 93H, and personal data, as defined in [M.G.L. c. 66A](#), including personal names, personal contact information, personal residence addresses as in resumes or references offered by bidders, social security, financial account information or drivers’ license numbers.

4.2.3.3 Other Information

Departments should refer to the Public Records Laws, [MGL c. 4, § 7, cl. 26](#) for other types of information that should not be disclosed.

4.2.4 Commodity Codes

All documents for purchase of products and services in COMMBUYS must be associated with at least one commodity code with no less than six meaningful digits, with the exception of cases where the application of this rule will result in inaccurate information (e.g. mixed products, mixed products and services, product or service groups for which a specific code is not available).

COMMBUYS uses a system of commodity codes based on the [United Nations Standard Products and Services Code® \(UNSPSC®\)](#), an open, global, multi-sector standard for efficient, accurate classification of products and services. The UNSPSC uses a hierarchical convention to classify products and services into general segments and then, with an increasing degree of specificity, into families, classes and commodities. Each of these four hierarchical levels is associated with two digits within the commodity code.

COMMBUYS commodity codes also include a custom four-digit extension for organizing products and services into further groups. The third digit of the extension (the eleventh digit of the full commodity code) is reserved for information about Environmentally Preferable Products (EPP). EPP, including recycled content, will be identified with an “8” in that position and products and services without an environmental attribute will have a “0.”

As an example, the COMMBUYS commodity code for an energy efficient notebook computer will be 432115030080:

Segment	Family	Class	Commodity	Extension
Information Technology Broadcasting and Communications	Computer Equipment and Accessories	Computers	Notebook Computers	EPP
43	21	15	03	0080

While commodity codes containing a “9” as an EPP identifier will also be available in the system, Departments are instructed not to use them for new contracts. OSD will update the set of commodity codes available in the system periodically. In addition, OSD will set policies on the use of the extension digits to organize, track and analyze the Commonwealth’s purchases.

4.2.5 Document Numbering

COMMBUYS maintains a system-generated sequential numbering system for all documents. Document numbers will include a document type identifier (e.g. Requisition, Bid, PO, etc.), fiscal year, and abbreviated COMMBUYS Organization, Department and Location information, followed by a system-generated sequential number. Organization Administrators, during Organization setup, will create the Organization, Department and Location abbreviations appropriate for their Organizations.

Departments may also continue to use their own systems for numbering Bids and MBPOs similar to the type used to number statewide contracts (e.g. OFF33, FAC79). If used, such custom numbers should be placed in the Bid or MBPO’s Description field.

4.2.6 Records Management for Procurement and Contract Files

Departments are responsible for retaining and archiving procurement and contract records (including invoices, supporting documentation and invoice verification) in accordance with the [Statewide Disposal Schedules](#) issued by the Secretary of State Records Conservation Board, contractual requirements and other state and federal laws pertaining to records retention. In accordance with [815 CMR 10.00](#), the Department is the keeper of the official record copy of contracts and invoices and all supporting documentation. MMARS is the official record of the encumbrance and payment documents entered into the system and will supersede any paper copies of the same information. The contract/procurement/payment file must contain or refer to the location of all documentation related to the particular contract and payments. Departments are not required to create paper copies of quotes and other documents submitted by Sellers electronically and stored within COMMBUYS.

4.2.7 Document Publication

COMMBUYS allows Departments to choose which documents stored within the system are made visible to the general public without logging in. Departments may set their own document publication policies with the understanding that:

- Documents set up to be unavailable to the public will still be viewable by **all** logged in Purchasers authorized to use the MBPO.
- All contract documentation with the exception of security-sensitive, personally identifiable and private content (such as Social Security Numbers, bank account numbers, etc.) identified in this document is subject to Public Records Requests.
- Departments are responsible for following any additional laws, regulations and policies that may apply to the disclosure of procurement information (e.g. see Section 8.4, Contracts Established Pursuant to the Information Technology Acquisition Policy).

Decisions to identify documents as not publicly viewable should be based on the likelihood of receiving Public Records Requests for the documents, whether the documents contain security-sensitive, personally identifiable and private content, and other considerations. Departments must ensure that any security-sensitive, personally identifiable and private content is redacted from documents uploaded and/or posted for public viewing.

5 INITIATING PURCHASES IN COMMBUYS

5.1 Requisition Requirement

All purchases in COMMBUYS from Departmental and Statewide Contracts must be initiated with a requisition. Upon approval, this requisition may be converted into a Bid, with additional requirements described in Section 6, or a Purchase Order, with additional requirements described in Section 10.

Organization Administrators may set internal policies exempting specified users or roles from this requirement. Such additional policies must ensure that all transactions obtain appropriate approval consistent with Department Internal Controls as well as with this and other applicable policies.

5.2 Types of Requisitions that Require OSD Approval

Within COMMBUYS, certain requisitions outside of the typical procurement process will require OSD's written approval before being approved within the system.

5.2.1 Request for Approval Not to Use a Statewide Contract

If a Department believes an existing Statewide Contract for products or services does not meet its business requirements and, therefore, feels it is necessary to issue a separate solicitation, it must receive approval from OSD prior to issuing a solicitation on COMMBUYS. Instructions for submitting such a request are provided in the [Procurement Overview](#) document in OSD's [Procurement Information Center \(PIC\)](#).

5.2.2 Notification of Intent to Create a Due Diligence Posting

There may be instances where a Department:

- is offered something at no cost or well below market cost;
- needs to purchase proprietary licenses or products for systems or software that they have already purchased after previously conducting a competitive procurement; or
- wants to conduct "pilot programs" or "product demos" in order to investigate new and emerging technologies.

OSD does not recognize these situations as procurement exceptions and requires Commonwealth agencies to test the market for the availability of competition. The first step in this process is to request OSD's approval to pursue one of the three types of transactions above. Instructions for submitting such a request are provided in the [Procurement Exceptions and Related Policies](#) document in OSD's [Procurement Information Center \(PIC\)](#).

5.2.3 Requests to Conduct a Collective / Cooperative Procurement or use a Cooperative Contract

Departments may, at times, utilize procurements issued by non-Massachusetts public entities, including those issued by the U.S. General Services Administration (GSA) and procurement departments of other states. When a Statewide Contract for the product or service exists, Commonwealth agencies are not allowed to use a cooperative procurement issued by GSA or another state. If the Department believes it can negotiate better value using a GSA or another state’s contract, it must follow the requirements for the Request for Approval Not to Use a Statewide Contract.

If a Statewide Contract for the product or service does not exist, the Department must notify OSD of its request to use a GSA or another state’s contract and receive prior approval from OSD. Instructions for submitting such a request are provided in the [Procurement Exceptions and Related Policies](#) document in OSD’s [Procurement Information Center \(PIC\)](#).

6 ISSUING BIDS IN COMMBUYS

6.1 Bid Requirement

Departments must use the system for issuing all solicitations/bidding opportunities. COMMBUYS refers to all solicitations, including requests for quotes (RFQ) against existing contracts, as “Bids” and provides several types of bids to meet various business process requirements. All responses to COMMBUYS Bids are referred to as Quotes.

6.2 Electronic Quote Requirement

Effective July 1, 2014, all bids posted on COMMBUYS must require the submission of electronic quotes. In COMMBUYS, acceptance of electronic quotes is enabled by checking off the “Allow Electronic Quote” checkbox in the bid header. In addition, Departments must include the Electronic Quote Requirement for Bids language, which is provided in Appendix 1 of this document, as an attachment or as part of their Request for Response (RFR).

6.3 Applicable Procurement Law

Each solicitation must indicate information about the law governing the procurement process for the solicitation. Most typical laws referenced in COMMBUYS solicitations will be:

What is Being Purchased	Applicable Laws
Goods and Services	MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00 and 808 CMR 1.00
Human and Social Services	MGL c. 7, § 22, § 22N; c. 30, § 51, § 52; 801 CMR 21.00; 808 CMR 1.00
Legal Services	MGL c. 30, § 51, § 52 and § 65; c. 7, § 22; and 801 CMR 21.01(2) (b)
Grants	MGL c. 7A, § 7; St. 1986 c. 206, § 17; 815 CMR 2.00

Other procurement laws which may be applicable are as follows:

Organization or Purchase Type	Applicable Laws
Public Housing Authorities	24 CFR 85.36; MGL 30B and 24 CFR 85.36
Non-executive Department Goods and Services	MGL c. 7, § 22; c. 30, § 51, § 52
Building Design Services	MGL c. 7, §§ 38 A½ -O
Energy Management Services	MGL c. 25, § 11C
Public Works > \$10K or Vertical Construction	MGL c. 30, § 39M<
Goods and Services purchased by municipalities	MGL c. 30B
Vertical Construction > \$25K	MGL c. 149, § 44A-M
World Trade Organization Announcement of Intent to Bid	WTO/Government Procurement Agreement Notice

6.4 Amendments

6.4.1 Amendment Deadline

COMMBUYS will not prevent Departments from amending Bids up until the Bid Opening Date/Time. Nevertheless Departments are required to provide reasonable time between the final amendment to the bid and the Bid Opening Date/Time (i.e. bid submission deadline). Departments are responsible for ensuring that the procurement calendar provides bidders adequate opportunity to respond to the latest version of the solicitation. The Department may extend the Bid Opening Date/Time at any point, even after the self-imposed amendment deadline.

6.5 Bid Questions and Answers (Q&A)

Questions and answers for each bid in COMMBUYS are part of the bid record.

6.5.1 Bid Q&A Deadline

COMMBUYS will not prevent Sellers from asking questions using the Bid Q&A functionality up until the Bid Opening Date/Time. In their bids, Departments may set a date/time after which they reserve the right not to respond to questions. Alternatively, Departments may amend their bids and inactivate the Q&A function at the time indicated to bidders on the procurement calendar. Departments are required to provide reasonable time between the date/time they cease to answer questions and the Bid Opening Date/Time.

6.6 Alternate Quotes

COMMBUYS will not prevent Sellers from submitting multiple quotes in response to the same bid. A Department's choice whether to evaluate multiple quotes by the same Seller must be included in the bid specifications. In cases where the specifications are silent on this issue, multiple quotes by the same vendor must be evaluated.

6.7 Bids Pursuant to the Information Technology Acquisition Policy

Pursuant to Appendix A of the [Enterprise Information Technology Acquisition Policy](#), Departments using Statewide Contracts for capital funded projects over \$50,000 must post such procurements as Open Bids on COMMBUYS. Such bids must include the public records notice and clear evaluation criteria as specified in the above-mentioned policy.

6.8 Notification Postings

6.8.1 World Trade Organization (WTO) Intent to Post

In compliance with the World Trade Organization (WTO)'s [Agreement on Government Procurement \(AGP\)](#), Departments seeking goods and services including human and social services valued at more than \$558,000 or construction valued at more than \$7,864,000 must post either (a) a COMMBUYS announcement of their intention to issue a bid and their actual Bid documents for a combined time period of at least 40 days prior to the Bid Opening Date or (b) the actual Bid documents for the entire 40 days prior to the Bid Opening Date. The Intent to Post template language is provided in Appendix 1 of this document. (Please Note: These WTO threshold levels change every 2 years and will be updated again in January 2016).

6.8.2 Due Diligence Posting Notices

If OSD approves a due diligence posting request submitted at the requisition stage of the process, the Department may proceed to create a Due Diligence Posting as a COMMBUYS Bid. The posting may consist of the interested Seller's offer or, in the case of Department seeking to conduct a Pilot or Demo Program, draft specifications, to determine if there are other interested Sellers willing to provide comparable value to the Department. Additional information on this policy can be found in Section 5.2.2 above and in the [Procurement Exceptions](#) document in OSD's [Procurement Information Center \(PIC\)](#).

7 RECEIVING AND EVALUATING RESPONSES, NEGOTIATIONS AND AWARD

7.1 Online vs Offline Evaluation

COMMBUYS includes an online Bid Tabulation tool allowing Departments to evaluate Quotes online. The use of the online Bid Tabulation tool to evaluate and assign scores is optional, but COMMBUYS will, at a minimum, require the Purchaser to enter an award recommendation for approval as part of the Bid Tabulation. Departments utilizing evaluation team members from outside the organization and intending to use the Bid Tabulation tool must consult the Section 3.6, Approval Paths, for guidance on enabling such team members on the system.

7.2 Competitive Negotiations, BAFOs, Clarifications, Corrections and Other Quote Revisions

COMMBUYS also includes Revision Request functionality that enables Departments to document outcomes of multiple rounds of competitive negotiations, BAFOs, clarifications, corrections and any additional negotiated changes to bidders' quotes. This functionality may help document the outcome of such activities pursuant to Section 4.2.6, Records Management for Procurement and Contract Files.

The use of COMMBUYS at that stage of the procurement process is optional and intended to support compliance with existing policy. The constraints presented by the tool (if any) should not limit the Department's ability to structure and conduct the evaluation and negotiation process, including oral presentations and demonstrations, reverse auctions, and other activities that are conducted outside of

the system (see [How to Do a Competitive Procurement](#) in OSD's [Procurement Information Center](#) for additional information).

7.3 Award and Notification

Once the results of the Bid Tabulation have been approved, COMMBUYS will automatically notify Apparent Successful Bidders of awards in support of existing policy (see [How to Do a Competitive Procurement](#) in OSD's [Procurement Information Center](#)). The system also sends similar notifications to Sellers who expressed interest in a bid. The use of this functionality is optional. If the notification functionality is not used, Departments must comply with the bidder notification policy by email or other means.

7.4 Contract Negotiations with Apparent Successful Bidders

Once all bidders have been notified of the outcome of quote evaluation, Departments may convert quotes into draft Purchase Orders (POs) or Master Blanket Purchase Orders (MBPOs). While these MBPOs and/or POs are in draft format, prior to contract execution, Departments may conduct final contract negotiations with the Apparent Successful Bidders (see [How to Do a Competitive Procurement](#) in OSD's [Procurement Information Center](#)). Pursuant to Section 4.2.6, Records Management for Procurement and Contract Files, at the completion of the contract negotiation, the outcome of the negotiation must be documented.

As stated in Section 7.2, Departments have the flexibility to use COMMBUYS in support of existing policy. Consistent with that principle, Departments participating in complex negotiations may choose to conduct notification of Apparent Successful Bidders outside of COMMBUYS and complete contract negotiations to the point of contract execution prior to approving the Bid Tabulation.

7.5 Contract Execution

COMMBUYS does not currently support electronic contract execution. This functionality may be added in Phase 2 of the project. Departments must follow the current policies regarding contract execution set forth in the Commonwealth's [State Finance Law and General Requirements](#) (See Contract Execution and Filing). Consistent with current requirements, Departments must check the [debarred vendor lists](#) as well as obtain, finalize and execute all required documents prior to moving the MBPO or PO into the "sent" status.

7.6 Bid Cancellation or Award

The document entitled [RFR – Required Specifications](#) available on the [OSD Forms](#) page specifies that bidders' quotes must remain in effect for at least 90 days from the date of bid submission. Unless a longer period of quote validity is specified in the bid, Departments must cancel the bid, or award and publish a contract, within 90 days of the Bid Opening Date. For further information on contract publication requirements see Section 8. In cases where the evaluation, negotiation and other activity exceeds the period of quote validity, Departments must request confirmation that the bidder's quote is still in effect.

8 CREATING CONTRACT RECORDS IN COMMBUYS

8.1 Master Blanket Purchase Order (MBPO) Requirement

Departments must use Master Blanket Purchase Orders (MBPOs) to document contracts and create catalogs for purchasing.

8.2 Contract Eligible Entities

8.2.1 Legacy and New Contract Types

Prior to the availability of COMMBUYS, the Commonwealth divided contracts into four groups based on the types of entities that were eligible to use the contract. These designations for each contract were recorded as “Contract Type” for each contract in Comm-PASS and will be visible as the “Type Code” for each Master Blanket Purchase Order in COMMBUYS (see Appendix 3 for the list of type codes allowing to locate new and historical records).

New contracts created in COMMBUYS will not utilize one of the four previously-used contract types, and the remaining three will be restructured.

Before March 24, 2014	After March 24, 2014
Statewide Contracts, including Designated Statewide Comm-PASS Contract Type: “Open to all eligible public entities”	Statewide Contracts: COMMBUYS Type Code: SW
Departmental Contracts Comm-PASS Contract Type: “Open for use with separate contract execution”	Will not continue COMMBUYS Type Code: SC
Departmental Contracts Comm-PASS Contract Type: “Restricted for use by defined entities only”	Limited User Departmental Contracts:
Departmental Contracts Comm-PASS Contract Type: “Restricted to use by issuing entity only”	COMMBUYS Type Code: LU

Contracts “open for use with separate contract execution” will no longer be created, but the designation will retain its meaning for all active contracts until their expiration. Departments wishing to use an existing contract “open for use with separate contract execution” must follow the requirements of the [Statewide Contract, Designated Contract, Single or Multiple Department Contract Guidance](#) for such contracts located in OSD’s [Procurement Information Center \(PIC\)](#), which will retain guidance for the use of legacy contracts. Once their separate contract with the Seller has been executed, the Department must create their own Departmental MBPO based on the signed contract.

8.2.2 Statewide and Limited User Contracts

New contracts created in COMMBUYS will be divided into two groups:

- **Statewide / Designated Statewide**, which will be available for use to all eligible entities, and
- **Limited User Contracts**, which will be available for use by one (i.e. the issuing Department) or more eligible entities (either listed specifically in the RFR or defined generally in the RFR and then subject to authorization by the issuing Department).

At the time of bid, Departments intending to issue a Limited User Contract must make every effort to name other entities (if any) that intend to use the resulting contract. Additional eligible entities may be added after contract award only if the original bid informed the prospective bidders of that possibility. Additional eligible entities may be identified by name or by general category.

Appendix 4 contains a list of types of eligible entities that may be authorized users of Limited User Departmental Contracts. Any contract available for use by **all** eligible entities is a Statewide Contract. Statewide Contracts may only be established by OSD or by a Department with OSD’s written approval.

At the time of Master Blanket Purchase Order setup, Departments must use the “Cooperative Purchasing Allowed” checkbox and the “Eligible Organizations” field to establish who will be able to purchase from the MBPO as follows:

Contract type	Cooperative Purchasing Allowed	Control Tab
Statewide	Checked	Add “All Org” as the Organization authorized to use the MBPO
Limited User Departmental Contract – Multiple Organizations	Checked	Add one or more Organizations authorized to use the MBPO
Limited User Departmental Contract – Single Organization	Unchecked	Defaults to issuing organization only

Only two type codes will be used for Bids, MBPOs and POs created in COMMBUYS: “SW” for Statewide and “LU” for Limited User Departmental. All other type codes should only be used for searching historical records created in Comm-PASS (see Appendix 3 for the list of type codes allowing users to locate new and historical records).

8.3 Catalogs

8.3.1 Catalog Content

All Master Blanket Purchase Orders are required to include a catalog of at least one line item created within the system or a link to a seller-hosted “punchout” catalog. The ability of the Purchasers to find the items they need depends on the level of detail included in the product/service description for each item in the catalog. In addition, the accuracy of the commodity code and product/service description will determine the Commonwealth’s ability to analyze and streamline its purchases in the future. To meet these needs, each catalog line item must include:

- **A commodity code** with:
 - No less than six meaningful digits of the UNSPSC with the exception of cases where the application of this rule will result in inaccurate information (e.g. mixed products, mixed products and services, product or service groups for which a specific code is not available), and
 - The four-digit extension including the EPP identifier, if applicable.
- **Detailed product/service description**, including (if applicable):

- Environmentally Preferable Product (EPP) information, including at least the “EPP” designation, and if possible the name of the environmental certification (e.g. Green Seal) and/or the product/service environmental attribute (e.g. post-consumer recycled content);
- Regional award information, including but not limited to cases where the contractor was awarded to sell a product only in certain regions of the state, and cases where pricing varies by region.

Catalogs are created and updated by Sellers, and it is the responsibility of the Seller to ensure the quality and accuracy of the information within the catalog (e.g. consistent commodity codes for products, product descriptions, etc.). Departments will provide guidance to Sellers on catalog structure and amount of detail required, and will be required to review and approve catalogs created by the Sellers prior to the publication of MBPOs. Additional information about catalogs can be found in the [COMMBUYS Resource Center](#).

8.3.2 Updates and Compliance

All catalogs must be updated regularly by the Seller based on the specifications set in the solicitation on the same schedule for system-hosted line-item catalogs as well as seller-hosted punchout catalogs. Departments will be required to review and approve the changes made by the Sellers prior to publication.

Updates to line-item catalogs are performed by generating a Change Order within COMMBUYS. The system will prevent the publication of any catalog amendment until the associated Change Order is approved. Similar functionality is not available for punchout catalogs; therefore, Departments must review changes to punchout catalogs outside of COMMBUYS prior to the approval and publication of the any amendments.

8.4 Contracts Established Pursuant to the Information Technology Acquisition Policy

Pursuant to Appendix A of the [Enterprise Information Technology Acquisition Policy](#), Departments using Statewide Contracts for capital funded projects over \$50,000 must post the outcomes of such bids on COMMBUYS as departmental MBPOs and include the contents of the winning quotes.

8.5 Contract Amendments

Contract amendments in the system are performed by using Change Order functionality. Pursuant to OSD and CTR’s [Amendments, Suspensions, or Terminations](#) policy, any changes must be contemporaneously reflected with encumbrance updates in MMARS.

9 PURCHASING FROM EXISTING CONTRACTS

9.1 Placing Orders through COMMBUYS

Departments must use COMMBUYS to place orders based on existing Statewide and Departmental Contracts. In cases where a purchase takes place based on authorization outside of COMMBUYS (e.g. retail purchases from existing contracts, utility purchases, incidental purchases, emergency purchases, etc.), the outcomes of such purchases must be entered into COMMBUYS after the fact.

9.2 Catalogs and Quotes

In cases where departmental policy, contract use instructions (referred to as [Contract User Guides](#) for Statewide Contracts) or contract terms require or encourage Departments to seek multiple quotes from vendors on an existing Departmental or Statewide Master Blanket Purchase Order, Departments will use COMMBUYS to request such quotes and document Seller responses. Some Departmental and Statewide Contracts may require Departments to utilize standardized RFQ and/or Statement of Work templates.

Pursuant to Appendix A of the [Enterprise Information Technology Acquisition Policy](#), Departments using Statewide Contracts for capital funded projects over \$50,000 must post such procurements as Open Bids on COMMBUYS. Such bids must include the public records notice and clear evaluation criteria as specified in the above-mentioned policy.

9.3 PO Approval and Submission to Sellers

Departments must ensure that prior to converting a PO into “sent” status:

- **For all POs:** all required contract forms have been completed and executed, and additionally,
- **For Open Market and Release POs:** sufficient funds have been encumbered in MMARS for the transaction.

See also Sections 3.4-3.6 on the security requirements for personnel involved in approving such POs.

9.4 Maintenance of Bill to and Ship to Addresses

It is the responsibility of the Organization Administrator to ensure that all remittance and shipping addresses and contact information in COMMBUYS is accurate as Sellers will utilize that information for transactions with the Department.

10 APPENDICES

10.1 Appendix 1. World Trade Organization (WTO) Intent to Post Notice

Instructions: To create a WTO posting, Departments must create a Bid record including the words “Announcement Only” followed by the bid title in the Description field. An attachment with the file name “IntentToPost” and the following content (with appropriate customization) must be attached to the Bid.

This is an announcement only. [Department Name] of the Commonwealth of Massachusetts intends to post a solicitation for [scope description] and to require online bid submission via COMMBUYS. Please do not contact the Purchaser with questions about the anticipated solicitation. Bidders are solely responsible to monitor this site for amendments to this announcement, if any, and for the complete Bid posting, if any. Bidders may monitor the site through publicly accessible search and browse tools, or through COMMBUYS email notification and record tracking tools by ensuring the commodity codes associated with this record are included in the commodity codes section of their COMMBUYS profile. Bidders may elect to subscribe to COMMBUYS immediately or wait until they have reviewed the complete Bid posting including the RFR and its amendments, if any. Bidders who elect to establish a COMMBUYS account must select the Register link on www.commbuys.com and complete the online subscription process.

10.2 Appendix 2. Electronic Quote Requirement for Bids

Instructions: An attachment with the file name “QuoteRequirements” and the following content (with appropriate customization) must be attached to the Bid, or its text included in the RFR, RFQ or other document published with the Bid. The language below requires submission of a Supplier Diversity Program (SDP) Plan, which is mandatory for all procurements of \$150,000 and above. Departments may adjust the wording for procurements under \$150,000.

[Department Name] of the Commonwealth of Massachusetts is soliciting responses for [scope description]. Bidders are advised that [Department Name] (1) restricts submission of written questions to the Bid Q&A tool and (2) requires all responses to be submitted using the online submission tools available to active COMMBUYS account holders only, and (3) requires submission of a Supplier Diversity Program (SDP) Plan as specified in the RFR file attached to this Bid. Bidders are solely responsible to monitor this site for Bid amendments, if any. Bidders may monitor the record by frequently checking the Header Information for the list of Amendments. Bidders with active COMMBUYS accounts may also monitor the record through COMMBUYS email notification and record tracking tools enabled when a vendor acknowledges receipt of a bid. To establish a COMMBUYS account, bidders must select the Register link on www.commbuys.com and complete the online subscription process.

10.3 Appendix 3. COMMBUYS Type Codes for New and Historical Transactions

The charts below show the type codes available for use in COMMBUYS. Only two type codes will be used in the system moving forward, “SW” for Statewide Bids, MBPOs and POs, and “LU” for Limited User Departmental Bids, MBPOs and POs.

Bid Type Codes

Type Code	Explanation	Use in COMMBUYS
SW	Statewide Bid	Historical and new transactions
LU	Limited User Departmental Bid	New transactions
RE	Restricted to Defined Entities	Historical only
RI	Restricted to Issuing Entity Only	Historical only
SC	Open for Use with Separate Contract Execution	Historical only
SI	Intent to Publish / WTO Notice	Historical only, not searchable
QQ	Quick Quote (Historical)	Historical only, not searchable
SH	Solicitation (Historical)	Historical only

MBPO / PO Type Codes

Type Code	Explanation	Active in COMMBUYS?
SW	Statewide Contract	Historical and new transactions
LU	Limited User Departmental Contract	New transactions
RE	Restricted to Defined Entities	Historical only
RI	Restricted to Issuing Entity Only	Historical only
SC	Open for Use with Separate Contract Execution	Historical only
QQ	Quick Quote Award (Historical)	Historical only, not searchable
SH	Contract (Historical)	Historical only

10.4 Appendix 4. Optional List of Eligible Entity Categories that May be Included in Limited User Contracts – Multiple Organizations (as described in Section 8.2)

1. Cities, towns, districts, counties and other political subdivisions;
2. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
3. Independent public authorities, commissions and quasi-public agencies;
4. Local public libraries, public school districts and charter schools;
5. Public hospitals owned by the Commonwealth;
6. Public institutions of higher education;
7. Public purchasing cooperatives;
8. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
9. Other states and territories with no prior approval by the State Purchasing Agent required; and
10. Other entities when designated in writing by the State Purchasing Agent.