



**Comptroller of Public  
Accounts**

**State of Texas  
Cooperative  
Purchasing  
Manual**

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## I. Introduction

Created by legislation in 1979, the Texas Procurement and Support Services Cooperative Purchasing Program (State of Texas CO-OP) provides the State of Texas volume purchasing power to local governments and assistance organizations. Members can purchase goods and services from state term contracts, TXMAS contracts, and piggyback contracts. Using these services through the State of Texas CO-OP will meet your competitive bidding requirements.

In this manual you will find general information about the State of Texas Cooperative Purchasing Program, as well as step-by-step instructions for using state contracts. Should you have any questions regarding the CO-OP program or the use of state contracts, please feel free to contact the CO-OP team.

### Phone Number

(512)463-3368

### Fax Number

(512)936-2667 (936-COOP)

### Email

[coop@cpa.state.tx.us](mailto:coop@cpa.state.tx.us)

### Website

<http://www.window.state.tx.us/procurement/prog/coop/>

### Physical Address

1711 San Jacinto Blvd.  
Austin, Texas 78701

### Mailing Address

PO Box 13168  
Austin, Texas 78711

## II. Membership Basics

### Membership Code and Status

View your five-character CO-OP membership code (or agency number), primary contact information, and renewal date in the online membership list at [www.window.state.tx.us/procurement/prog/coop/coopmemb/](http://www.window.state.tx.us/procurement/prog/coop/coopmemb/)

You will receive membership renewal notices at 60 days prior, 30 days prior and two weeks prior to your membership renewal date.

### Updating Contact Information and Authorized Purchasers

- For Agent of Record name changes, the State of Texas CO-OP requests that you complete a Name Change form. Since Agents of Record are authorized to sign purchase orders, their signatures must be on file. You can download a Name Change form at [www.window.state.tx.us/procurement/prog/coop/coopform/](http://www.window.state.tx.us/procurement/prog/coop/coopform/)
- To change your entity's e-mail address, physical address, or phone numbers, please e-mail or fax the changes to the general e-mail or fax number listed above.

### Address Codes - OPTIONAL

- View your current address codes at [www.window.state.tx.us/procurement/tools/aida/](http://www.window.state.tx.us/procurement/tools/aida/)
- Address codes are used to reference a specific address at your entity. This saves time for entities with multiple delivery locations. When submitting an automated term contract requisition, you may use the 3 character code in lieu of entering the entire address.
- Address codes can be any unique three characters for your entity, ex: 300 1AA, 262, etc.
- For example, if a school district has three campuses, it can set up campus 1 with address code 100, campus 2 with address code 200 and campus 3 with address code 300.
- To create address codes, please submit the Address Code form on [www.window.state.tx.us/procurement/prog/coop/coopform/](http://www.window.state.tx.us/procurement/prog/coop/coopform/)

### Additional Support

Contact the CO-OP team for information on the following topics:

- New CO-OP training program including conference calls
- Certified Purchasing Training Program classes open to CO-OP members  
—see [www.window.state.tx.us/procurement/prog/training-cert/](http://www.window.state.tx.us/procurement/prog/training-cert/)
- Request a speaker for your next event
- Vendor Relations Support Program

### III. Purchasing Options

#### Purchasing Statutes

The State of Texas CO-OP offers several purchasing options to members. Specific statutes governing CO-OP purchases from State contracts include:

1. Local Government Code, Section 271.083(4)(b), which states:  
*A local government that purchases an item under a state contract satisfies any state law requiring local governments to seek competitive bids for the purchase of the item.*
2. Government Code, 2155.062., Purchase Methods
  - a) In purchasing goods and services the commission may use, but is not limited to, the:
    - 1) contract purchase procedure;
    - 2) multiple award contract procedure, including any schedules developed under Subchapter I;
    - 3) open market purchase procedure; or
    - 4) reverse auction procedure.
  - b) Chapter 2156 provides additional information on purchase methods.
  - c) Chapter 2157 provides additional information on purchase of automated information systems.
  - d) In this section, "reverse auction procedure" means:
    - 1) a real-time bidding process usually lasting less than one hour and taking place at a previously scheduled time and Internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services; or
    - 2) a bidding process usually lasting less than two weeks and taking place during a previously scheduled period and at a previously scheduled Internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services.

#### Contracts vs. Resources

The State of Texas CO-OP recommends reviewing our contracts for your purchasing needs in the following order:

1. Term Contracts
2. Food Schedules
3. TXMAS Contracts
4. Piggyback Contracts
5. Department of Information Resources (DIR) Contracts

If you have not identified the item or service you seek on an existing contract, the State of Texas CO-OP provides the following services:

1. Search for other vendors on the Centralized Master's Bidders List.
2. Request Comptroller of Public Accounts (CPA) support for an Open Market Purchase.
3. Coordinate with our Reverse Auction service vendor (on contract) to competitively bid your item or service.
4. Use the Electronic State Business Daily to post bid solicitations and awards on-line.

## IV. Term Contracts

[http://www2.cpa.state.tx.us/cat\\_page/](http://www2.cpa.state.tx.us/cat_page/)

- CPA term contracts are competitively bid and established by the state's purchasing team, using quantity purchasing history and the state's volume purchasing power to establish best value.
- CO-OP members can order items from more than 200 contracts at any quantity and dollar value. Contracted commodities and services include copiers, vehicles, law enforcement supplies, medical equipment, the State of Texas Procurement Card Program, shipping services, and more.
- Term contracts are posted online by National Institute of Governmental Purchasing (NIGP) class number, are searchable by keyword, and are refreshed online weekly or as needed by CPA.
- Contract types:
  - **Automated Contracts** – e.g.: 045-A1 Appliances and Equipment, Household Type
    - Include specific commodity codes and clauses
    - Requisitions are submitted to CPA; purchase orders are generated by the CPA system and mailed directly to the ordering entity and vendor and posted on the CPA website.
  - **Non-Automated Contracts** – e.g.: 055-N1 Automobile and Truck Accessories
    - Include additional requirements that cannot be described by a specific commodity code (e.g., voting machines, business cards)
    - A Non-Automated Purchase Order form must be completed for each individual vendor, sent directly to the vendor, and a copy sent to CPA.

### How to Search

You can access the CPA Term Contracts at [http://www2.cpa.state.tx.us/cat\\_page/](http://www2.cpa.state.tx.us/cat_page/)

On this Web page, there is a complete listing of all current CPA term contracts in order of the numeric commodity class code. To access each contract, click on the contract number.

The search box is in the top right-hand corner of the contract listing. Type in a keyword to view the correct contract.

Window on State Government Susan Combs Texas Comptroller of Public Accounts

### CPA Term Contract Numeric Index

**NOTE:** The products listed are for the use by eligible State of Texas entities ONLY and are not for personal purchase or purchase by commercial entities.

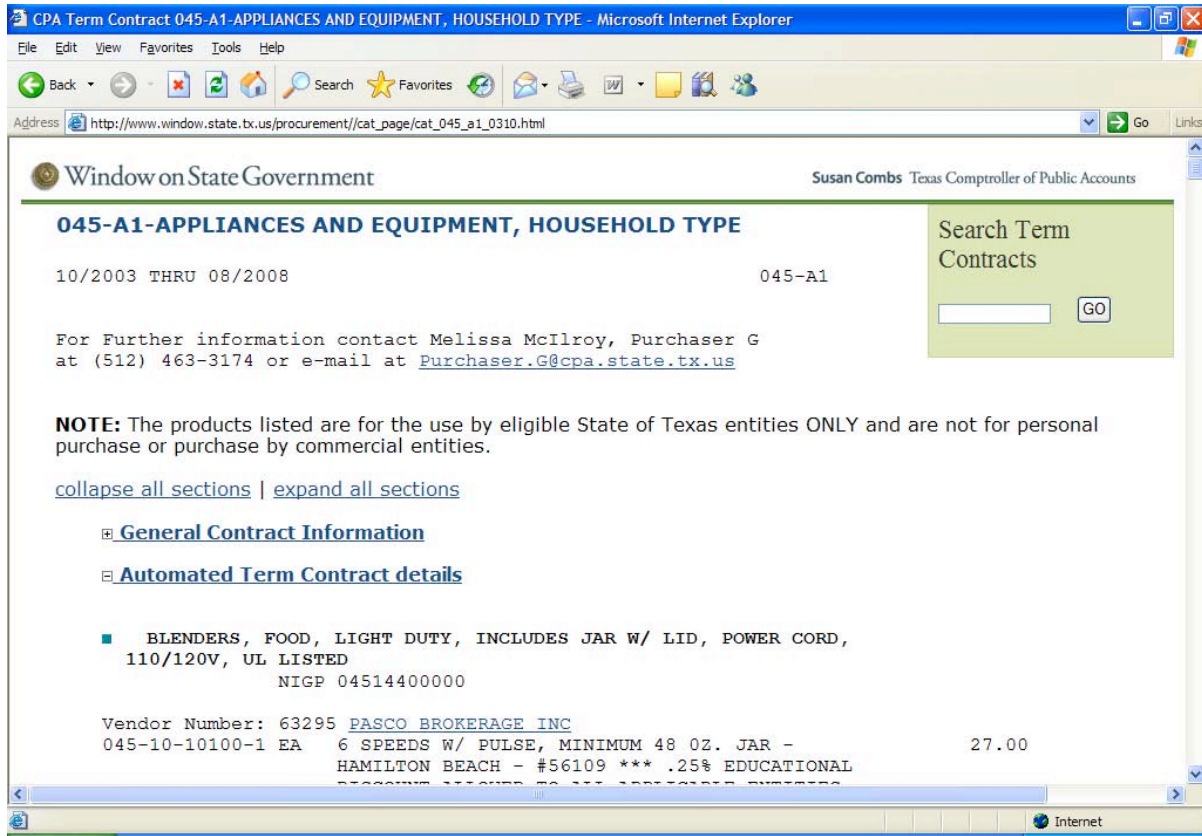
[View List of Counties](#) by Zone, HW District, Area, COG, USSR

Search Term Contracts

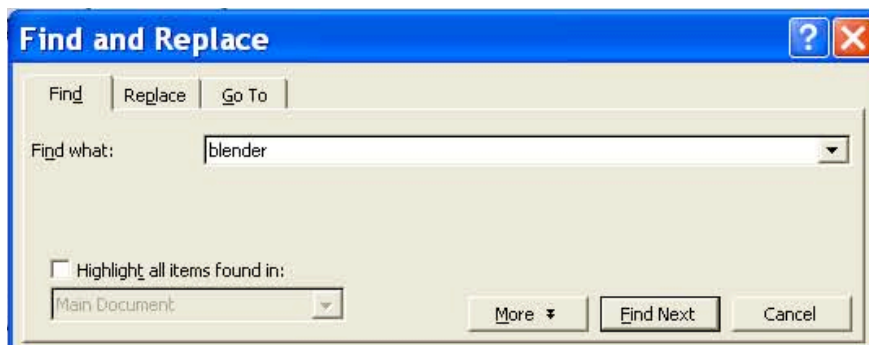
Term Contract	Contract Description
<a href="#">» 031-A1 03/2004 THRU 10/2008</a>	AIR CONDITIONING, HEATING, & VENTILATING: EQUIPMENT AND ACCESS
<a href="#">» 045-A1 10/2003 THRU 08/2008</a>	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE
<a href="#">» 050-A1 01/2005 THRU 12/2009</a>	ART EQUIPMENT AND SUPPLIES
<a href="#">» 052-A1 01/2005 THRU 12/2009</a>	ART OBJECTS
<a href="#">» 055-A1 01/2006 THRU 12/2009</a>	AUTOMOBILE AND TRUCK ACCESSORIES
<a href="#">» 055-N1 02/2006 THRU 10/2008</a>	AUTOMOBILE AND TRUCK ACCESSORIES
<a href="#">» 060-A1 11/2004 THRU 10/2008</a>	AUTOMOBILE AND TRUCK MAINTENANCE ITEMS AND REPLACEMENT PARTS
<a href="#">» 065-A1 10/2006 THRU 12/2009</a>	DUMP TRUCK BEDS AND ACCESSORIES

## Tips

- Automated term contracts are divided into 3 sections: General Contract Information (delivery information, cancellation policy, etc), Automated Term Contract Details (goods or services listed by NIGP code with prices), and Contract Vendor List (vendor contact information). Clicking the '+' next to each title will expand that section.



- Use CTRL-F to bring up the "Find" function and search the page for a specific model number, vendor name, commodity code, etc.



- Automated Term Contract Details are listed by NIGP code. The general description of an item is listed first (e.g.: Blenders, Food). The awarded vendor is listed underneath that general description. The vendor's contact information is included in the Contract Vendor List section. Below the vendor's number and name, there is specific line item information in the following order: Commodity Code, Unit, Description, and Price.

[View List of Counties](#) by Zone, HW District, Area, COG, USSR

## 045-A1 - APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE

10/2003 THRU 12/2007 045-A1

For Further information contact Melissa McIlroy, Purchaser G at (512) 463-3174 or e-mail at [Purchaser.G@cpa.state.tx.us](mailto:Purchaser.G@cpa.state.tx.us)

**NOTE:** The products listed are for the use by eligible State of Texas entities ONLY and are not for personal purchase or purchase by commercial entities.

[collapse all sections](#) | [expand all sections](#)

**General Contract Information**

**Automated Term Contract details**

**BLENDERS, FOOD, LIGHT DUTY, INCLUDES JAR W/ LID, POWER CORD, 110/120V, UL LISTED**  
NIGP 04514400000

Vendor Number: 63295 [PASCO BROKERAGE INC](#)

045-10-10100-1 EA 6 SPEEDS W/ PULSE, MINIMUM 48 OZ. JAR - HAMILTON BEACH - #56109 \*\*\* .25% EDUCATIONAL DISCOUNT ALLOWED TO ALL APPLICABLE ENTITIES \*\*\* NIGP 04514400508

Price: 27.00

**CAN OPENERS, LIGHT DUTY, AUTOMATIC HANDS-FREE OPERATION, AUTOMATIC SHUT-OFF, REMOVABLE CUTTER ASSEMBLY FOR CLEANING, CORD STORAGE, 110/120V, UL LISTED**

Commodity Code

Unit

Group Description

Vendor

Price

Item Description

- To print only a portion of the contract that pertains to your purchase, use your mouse to highlight the relevant section. Hit CTRL-P to bring up the print window and choose "Selection" in the page range area.

**Print**

Printer Name: HP4100\_CS83\_West\_IP  
 Status: Idle  
 Type: HP LaserJet 4100 PCL 6  
 Where: IP\_204.64.22.135  
 Comment:

Page range:  All  Current page  Selection

Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12

Copies: Number of copies: 1  Collate

Print what: Document  
 Print: All pages in range

Zoom: Pages per sheet: 1 page  
 Scale to paper size: No Scaling

Options... OK Cancel

## Zones

The State is divided into five geographic zones. A few term contracts are awarded by zone. In these instances, different vendors and prices will be awarded the same item for different zones in the state. View your zone at: [www2.cpa.state.tx.us/cat\\_page/zone\\_list.txt](http://www2.cpa.state.tx.us/cat_page/zone_list.txt). Please note that items will be ordered from the vendor awarded the item for your zone.

## How to Order - Automated Contract Requisition form

1. Use the Contract Requisition form located online at <http://www.window.state.tx.us/procurement/prog/coop/coopform/> to order items on *automated* term contracts. Items from different contracts and different vendors may be included on one requisition. The requisition must be completed as follows before submission.
  - **Requisition Number**- Enter your membership code, fiscal year designator, and order number. (e.g.:A1234-8-1)
    - CPA assigns your membership code, or agency number. View your membership code at: <http://www.window.state.tx.us/procurement/prog/coop/coopmemb/>
    - Fiscal year designator is the last digit of the fiscal year. Use an 8 for FY2008 (9/1/07 - 8/31/08).
    - The order number is a unique number for this order, assigned by your entity. Many entities start with 1 at the beginning of each fiscal year. You may also use the last 5 digits of your internal purchase order number. The order number has a maximum of 5 digits.
  - **Address codes** - Enter the address code representing your invoice and destination addresses if you have assigned any through the CO-OP Program. If you have not assigned address codes, please write "special" in the invoice and destination code fields. See Section I., Membership Basics for more information
  - **Name and Address to Invoice** - This is only required when the invoice code is "special".
  - **Destination of Goods** - This is only required when the destination code is "special". If this is the same as the invoice address, please leave blank.
  - **Contact** - Enter the name and phone number of the person in your organization to contact with questions about this requisition.
  - **Accounts Payable** - Enter the name and phone number of the person in your organization to contact with questions about payment. If this is the same as the main contact person, you may leave this blank.
  - **Quantity** - the amount you wish to order. Fractions or portions of a unit cannot be ordered. For example, if the unit of measure for a commodity is DOZ. (dozen), you must order in exact dozens.
  - **Unit** - Enter the unit of measure exactly as it is shown in the term contract for the item ordered. If the unit is DOZ., you must specify the number of dozen you wish to order, For example: 1 DOZ., **not** 12 EA. *Likewise*, if the unit is EA but the item is packaged with 12 per package, you must specify the number of each you wish to order. For example: The description says 12 come in a package, but the unit of measure is EA. You enter 12 EA if you need one package.
  - **Commodity Code** - Enter the complete eleven (11) digit *numeric* code in the exact format shown for the item. This is the number to the left of the item description.
  - **Description and specifications** - This field is optional in most instances and will only be used by CPA's data entry staff when supplemental data is necessary as noted in the term contract. You must enter additional information when required by contract.
    - Example: The contract states "Agency must specify color." You enter the color: white.
    - Other information, such as rental period, may be required by the General Contract Information section of the contract. When additional information is required, the requisition will not process without it. Please enter the required information in this section of the requisition.
    - Special instructions such as delivery or entity purchase order number can also be referenced in this area.
    - View the Optional Term Contract Clauses at [www.window.state.tx.us/procurement/tools/clauses/](http://www.window.state.tx.us/procurement/tools/clauses/) Clauses with "RESTR" to the left hand side are restricted to only the CPA orders. You may use clauses not labeled "RESTR." Clauses labeled REQ are required for certain contracts (e.g.: Clause 69 Rental Period for all photocopier orders).
  - **Signature, Title, Date** - Signature of the person authorized as the Agent of Record by resolution.
2. Submit one (1) copy to the CO-OP program. You do not need to submit a copy to the vendor.

3. CPA Contract Purchase Order(s) will be issued by the Texas Comptroller of Public Accounts one day after processing for the item(s) you have requisitioned.
  - Separate contract purchase orders will be issued for each vendor represented by a single CO-OP requisition.
  - Each purchase order will reflect the state of Texas CO-OP requisition number and will have a unique six digit CPA contract purchase order number.
  - **The CO-OP will mail one copy of each CPA Contract Purchase Order to the vendor. One (1) copy will also be sent to the ordering entity at the invoice address.**
  - **It is your responsibility to *review your copy* of the CPA Contract Purchase Order for any discrepancies or errors and immediately contact the State of Texas CO-OP at (512)463-3368 if any discrepancies are found.**
4. View your Purchase Orders online. POs are available online the day after processing.  
<http://www2.cpa.state.tx.us/conpo/>
5. "Confirmation" CO-OP Requisitions (urgent need only) - When items are urgently needed, you may submit a requisition on a confirmation basis. Contact the vendor and, if the vendor agrees to accept the order as a confirmation, place your requisition with CPA. The vendor has a right to not accept confirmation orders. To place a confirmation order, follow these procedures:
  - Enter the word "CONFIRMATION" in all *upper-case letters* above the requisition number. It is helpful to underline or asterisk this word to help it stand out on the requisition form.
  - Enter the date that the items were confirmed ordered with the vendor adjacent to or immediately below the word "CONFIRMATION".
  - Enter any vendor contact names or phone numbers for the person who accepted your confirmation request.
  - If your internal purchasing system requires that you create an internal purchase order and if you send a copy of that purchase order to the vendor, please also reference your purchase order number.

A Confirmation Requisition may contain any number of items, but they all must be confirmation items. If the requisition contains items that were ordered on different dates, place the date on which each item was ordered in the "Description and Specifications" column immediately adjacent to the commodity code number.

Confirmation Requisitions should be sent to CPA within seven (7) days of the confirmation date.

**Note: Confirmation Requisitions must not be done on a regular basis or without a true urgent need. Though a state confirmation purchase order will contain the verbiage "Confirmation Order - Do Not Duplicate," duplicate shipments may occur and you may be held responsible for any return freight charges and/or applicable restocking fees.**

6. Payment - The State of Texas CO-OP member accepts sole responsibility for payment to the vendor and will make payment directly to the vendor in accordance with the provisions of the state purchase order. It is understood that the state shall incur no responsibility in connection with payment.

**CONTRACT PURCHASE REQUISITION**  
to the  
**TEXAS COMPTROLLER OF PUBLIC ACCOUNTS**  
**PO Box 13186**  
**Austin, TX 78711**

Contract Purchase Requisition

Name and Address to Invoice:	Address Code
Ship to (if different):	Address Code

**Requisition #:** \_\_\_\_\_  
(Acct No) - (FY) - (Order #)

**Date:** \_\_\_\_\_

Name and phone # of person to be contacted regarding this request:

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

Accounts Payable Name and phone # of person to be contacted regarding this requisition:

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

Quantity	Unit	Commodity Code	Description and Specifications

The above Local Government hereby requests that the Texas Comptroller of Public Accounts purchase the items specified above under provisions of Local Government Code - V.T.C.S., Sections 271.081 - .083. The above Local Government accepts sole responsibility for payment to the vendor, and will make payment directly to the vendor in accordance with provisions of the purchase order. It is understood that the state shall incur no financial responsibility in connection with this purchase.

\_\_\_\_\_  
**Signature** (Authorized by Resolution) **Title** **Date**

**Fax to: 512-936-2667 Email to: coop@cpa.state.tx.us**

## How to Order – Non-Automated Purchase Order Form

1. A Non-Automated Purchase Order form must be completed for each individual vendor. The purchase order must be completed as follows:
  - **Date of order:** Enter the date the order is prepared.
  - **Name and address of contractor:** Found in the non-automated term contract.
  - **Agency invoice address:** The vendor's invoice will be mailed to this address.
  - **Agency destination address:** Address to which the vendor will ship goods. If this is the same as Item 3, write "same."
  - **Requisition number:** Composed of entity's account number, fiscal year designator and the ordering entity's assigned number.
  - **Commodity class, item and sub-item numbers:** Found in the non-automated term contract.
  - **Description of material:** Include product code and brand. Must include name of price list and page number from which item was taken. (e.g.: Fall/Winter, 1995 Catalog, page 7, Kodak Ribbon #45FC98).
  - **Quantity:** Enter the amount ordered and unit of measure (i.e., each, pkg., doz., etc).
  - **Unit price:** Found in the non-automated term contract or in the price list referred to in the term contract.
  - **Extensions:** Quantity multiplied by unit price.
  - **Discounts:** Any applicable discount will be found in the non-automated term contract. Compute and deduct the discount and show the net amount for each item or sub-item.
  - **Order Total:** Sum the net amounts, if more than one, and enter the grand total for the order.
  - **Signature:** Orders must be signed by an authorized agent of record. (See Section I., Membership Basics)
  - **Agency accounting information:** For state agencies, this line may bear the information required by TPFA.
  - **Zone:** Enter the zone to which the materials are being shipped.
  - **Vendor #:** Five digit number in the vendor list at the end of the non-automated term contract.
2. The Non-Automated Purchase Order form must be completed for items on non-automated term contracts. The ordering entity submits the original to the vendor and a copy to CPA. Send the CPA copy to:

Fax to: (512)936-2667 Email to: coop@cpa.state.tx.us	Texas Comptroller of Public Accounts – TPASS PO Box 13186 Austin, Texas 78711
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3. Price Lists - Vendors are obligated to furnish standard current price lists to users on the discount-from-list contracts. Users must request these price lists from the vendors listed in the non-automated term contracts. These price lists should be properly identified and dated.

NON-AUTOMATED CONTRACT

VENDOR #

PURCHASE ORDER

ON ALL PAPERS AND PACKAGES SHOW THIS NO.



Texas Comptroller of Public Accounts  
PO BOX 13186, AUSTIN, TX 78711-3186

Contractor & Shipper

Address

City

REQUISITION NO. \_\_\_\_\_

DATE \_\_\_\_\_

All items must meet all applicable OSHA standards & regulations, and bear the appropriate listing from UL, FMRC or NEMA.

STATE SALES TAX EXEMPTION CERTIFICATE:  
The undersigned claims an exemption from taxes under Chapter 20, Title 122A, Revised civil Statutes of Texas, for purchase of tangible personal property described in this numbered order, purchased from contractor and/or shipper listed above, as this property is being secured for the exclusive use of the State of Texas.

Authorized Signature

Agency Accounting Information

Agency Invoice Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

---

Agency Destination Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ITEM		ZONE	QUANTITY	CATALOG UNIT PRICE	EXTENSION

## **Purchase Order Change Notice (POCN)**

<http://www.window.state.tx.us/procurement/prog/coop/coopform/>

### **Cancellations**

1. Notify the vendor by telephone of intent to cancel.
2. Cancellation of purchase orders should be requested on a Purchase Order Change Notice. The reason for the cancellation must be stated.
3. *If the vendor is not in default, the cancellation request must indicate that the vendor has agreed to the cancellation.*
4. Fax the POCN to the vendor directly and to the CPA at (512)936-2667.

### **Corrections**

1. Review your copy of the State purchase order for any errors.
2. If there are errors, determine if it is on our part or yours. If the error is our fault, please contact the CO-OP immediately at (512)463-3368.
3. If the error is on your part, please complete a POCN.
4. If the correction could result in an incorrect delivery of merchandise, notify the vendor and CPA immediately of the intended correction.
5. The reason for the correction request must be stated on the POCN.
6. Note if the correction will result in a change in the total dollar amount of the order. Please note this as "From: \$XXX.XX To: \$XXX.XX"
7. Fax the order to the vendor directly and to CPA at (512)936-2667.
8. CPA will process the POCN to update your order. We will not create a new state purchase order. The copy of the POCN that you send to the vendor is the only change notification they will receive.

# Purchase Order Change Notice Through the Texas Comptroller of Public Accounts

Ordering Entity Name City of Anytown

Date: 10/21/2007

Address PO BOX 123  
Anytown, TX 71234

Ordering Entity Point of Contact: John Doe

Telephone Number: 123-456-7890

To: Vendor ID No. 1-23-456-7890-1  
Vendor Name Tire Company  
Address: PO BOX 1234  
FT WORTH TX 76110

Purchase Order No.: 7-314720  
Req. No.: M0001-7-68  
Order Date: 10/17/06  
Class: 863-14

Change for: Open Market       Automated Contract      Non-Automated Contract

Item or Commodity Code	Change
863-14-01110-6	Change Quantity from 10 to 15. From: Quantity of 10 To: Quantity of 15  Old total: \$1000 New Total: \$1500

Reason: Typo on requisition form. Need 15 units

Requested by (Ordering Entity Signature)

Date: 10/21/07

Telephone Number: 123-456-7890

See Procurement Manual, Section 2.49 Purchase Order Change Notice

## V. Texas Multiple Award Schedules (TXMAS)

<http://www.cpa.state.tx.us/procurement/prog/txmas/>

Texas Multiple Award Schedules provide such items as tires, sporting equipment, furnishings for offices and facilities, general contractor services and much more.

TXMAS Contracts meet your competitive bidding requirements.

Texas Government Code 2155.504, Use of Schedule By Governmental Entities

- (b) A state agency or local government may purchase goods or services directly from a vendor under a contract listed on a schedule developed under this subchapter. A purchase authorized by this section satisfies any requirement of state law relating to competitive bids or proposals and satisfies any applicable requirements of Chapter 2157.
  - (c) The price listed for a good or service under a multiple award contract is a maximum price. An agency or local government may negotiate a lower price for goods or services under a contract listed on a schedule developed under this subchapter.
- These contracts were developed from contracts that have been competitively awarded by the federal government or any other governmental entity of any state and offer access to multiple vendors with preferred state of Texas customer pricing. The schedules cover multiple commodity groups with multiple year duration (basic five years with three extension options).
  - CPA recommends CO-OP members examine alternative TXMAS sources, if available, to make a best value purchase. If a proprietary purchase is to be made (without a best value evaluation), it is recommended that a document explaining the reason for considering only one source be prepared and placed in the purchase order file for future reference and audits.

### How to Recommend a Vendor for a TXMAS Contract

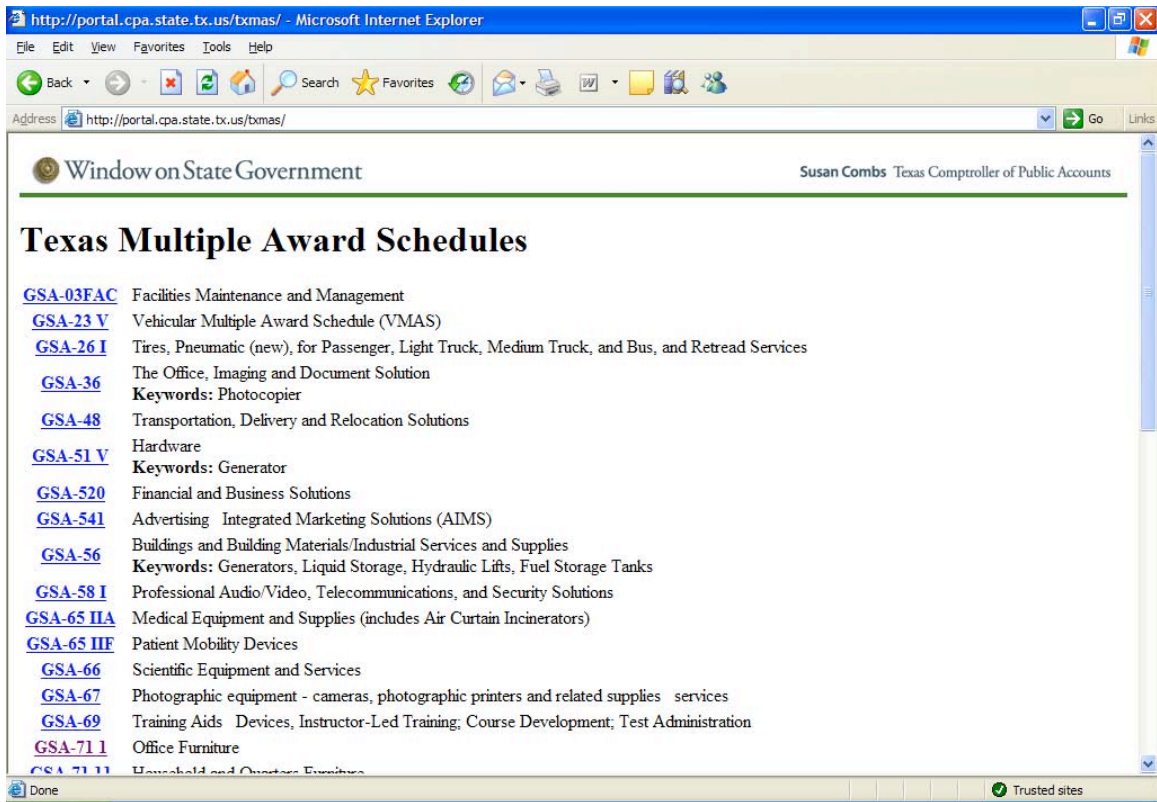
- To request a product or service addition to the TXMAS program or to suggest adding a vendor who is on a GSA (federal) contract or another state contract that you would like to see on a TXMAS schedule, please send an e-mail to [txmas@cpa.state.tx.us](mailto:txmas@cpa.state.tx.us) or call (512)463-3421 or (512)463-8839.

### How to Search

1. You can access the TXMAS Program from <http://portal.cpa.state.tx.us/txmas/>
2. TXMAS Contracts are listed by schedule with description. To access each contract, click on the contract number.
3. The General Contract Information, including Terms and Conditions, is listed first with links to the vendors' online TXMAS product list and pricing.
4. Click 'Online Catalog/Order Processing' to view a vendors price list. Vendors may ask you to log in to access their TXMAS pricing.
5. You can also do a keyword search from <http://www.window.state.tx.us/procurement/prog/txmas/>

### Tips

- Learn the vendor and/or GSA schedule number and use the Contract Listing to drill into the vendor pricing.
- Use the search function when you are searching by commodity type or service.
- Use the NIGP links on the CPA Web site to help you complete your TXMAS Purchase Order. <http://www.window.state.tx.us/procurement/tools/comm-book/>



## How to Order from a TXMAS Contract

- CO-OP members issue their own purchase order and include the following:
  - CO-OP Number – five character membership code. (See Section I., Membership Basics).
  - TXMAS Contract Number
  - NIGP Class and Item Codes – choose the code for the most expensive line item on your order. The vendor should be able to provide their specific NIGP information to you.
    - Link to NIGP Codes: [http://www2.cpa.state.tx.us/com\\_book/commall.html](http://www2.cpa.state.tx.us/com_book/commall.html)
    - Use Control and F to search for a specific item.
- Submit the purchase order directly to the TXMAS vendor and fax a copy of the PO to CPA: (512)475-0708.
- A TXMAS purchase order template is available at <http://www.window.state.tx.us/procurement/prog/coop/coopform/>

## VI. Food Schedules

For certain commodities, CPA combines requisitions into one solicitation for items that are used by many entities within a defined time frame. These purchases are called Scheduled Purchases, a form of term contract. CPA mails out Scheduled Purchase requisitions to CO-OP members who request a copy. Entities complete the requisition based on anticipated needs and return it to CPA on or before the specified schedule deadline date.

To be placed on the mailing list to receive a Scheduled Purchase Requisition, please contact your CO-OP team.

**How to Order** – <http://www2.cpa.state.tx.us/sawards/index.html>

CPA negotiates a variety of scheduled food purchases each year for agencies, school districts, and other CO-OP members. Food and delivery schedule input per agency or CO-OP member is requested by CPA at the beginning of the calendar year. Food types offered include:

- Full Line Food for Cafeterias by regions;
- Bread and pastries; and
- Milk and dairy.

CPA mails a Food Schedule Requisition form to each participating member. Members then submit their requisition back to CPA with quantities noted for each food type as well as number of buildings and frequency of delivery per week.

## VII. DIR Store – IT Products and Services

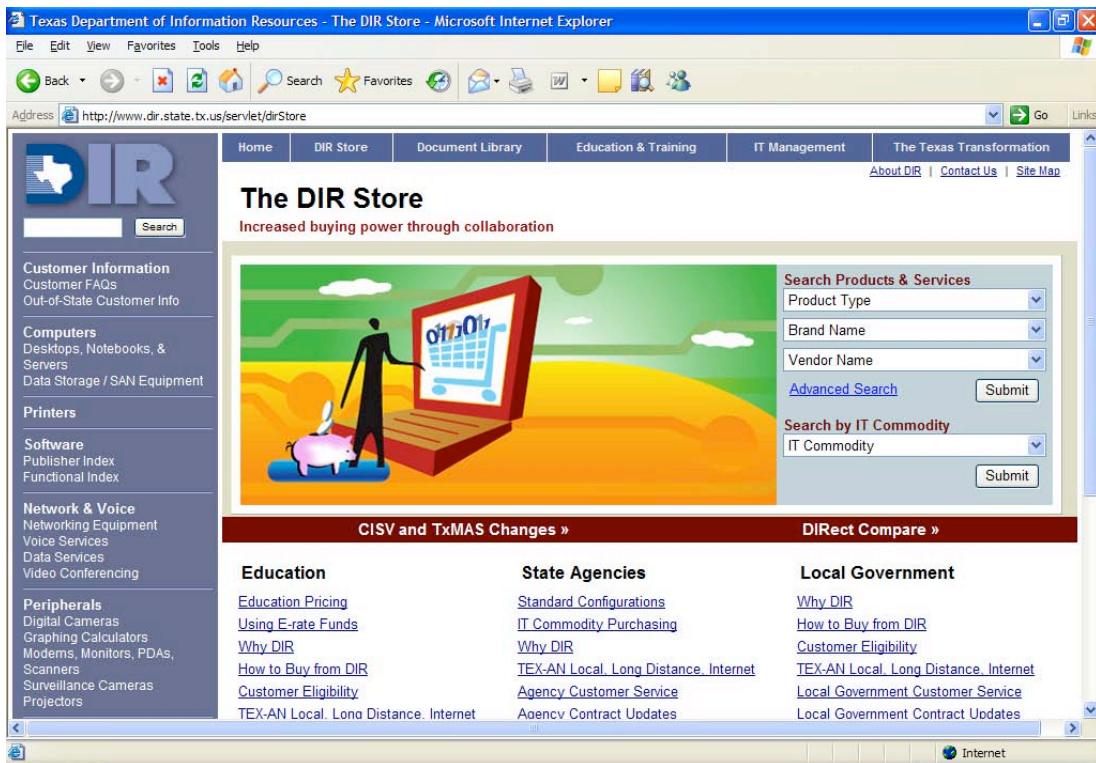
The Department of Information Resources (DIR) offers state-negotiated contracts with discounts from major information technology vendors. CO-OP members may order IT items from DIR contracts.

Contracts include:

- Computers
- Software
- Networking Equipment
- Data Storage/Storage Area Network Equipment
- Printers
- Videoconferencing & Communications Equipment
- IT Equipment
- Seat Management
- Training

### How to Search

You can access the DIR Store Contracts from the CO-OP Web page or go directly to <http://www.dir.state.tx.us/servlet/dirStore>. On the DIR search page, you can search by Product Type, Brand Name, Vendor and HUB Type or search by commodity class code.



## VIII. Centralized Master Bidders List

<http://www2.cpa.state.tx.us/cmbl/cmblhub.html>

The Centralized Master Bidders List (CMBL) is a master database used by state agencies to develop a mailing list for vendors to receive bids based on the products or services they can provide to the State of Texas. Vendors wishing to furnish goods or services to the state should apply to be on the CMBL to receive notice of bid opportunities.

### THE CMBL IS NOT AN APPROVED VENDOR LIST.

**Please search Term, TXMAS, or Piggyback Contracts to view awarded vendors.**

The CMBL is simply a searchable mailing list. A vendor on the CMBL has paid \$70 a year to be listed on the CPA Web site and receive copies of bids. A vendor is not required to be on the CMBL to do business with the state of Texas. Vendors on the CMBL may or may not have contracts with the state of Texas.

You may use the CMBL to search for sources. CPA recommends following your internal purchasing policies. Typically, informal bids are required for purchases between \$5,000 and \$25,000. The CMBL can be used as a source of vendors for specific commodity types that your organization plans to bid competitively.

### How to Search the CMBL

Enter one or any combination of the following search terms:

- Vendor ID or Vendor Number
- Vendor Name
- Vendor located in a specific City
- Specific Class and Item Codes (search by the goods or services the vendor can provide)

### Historically Underutilized Business Search

You can also search the CMBL for Historically Underutilized Businesses (HUBs). A "Historically Underutilized Business" is an entity whose principal place of business is in Texas, and is at least 51 percent owned by an Asian Pacific American, black American, Hispanic American, Native American and/or American woman who resides in Texas and has proportionate interest and demonstrates active participation in the control, operations and management of the entity's affairs.

Search the Centralized Master Bidders List - Microsoft Internet Explorer

Address: <http://www.cpa.state.tx.us/procurement/cmbl/cmblhub.html>

Window on State Government Susan Combs Texas Comptroller of Public Accounts

### Centralized Master Bidders List (CMBL) & Historically Underutilized Business (HUB) Search

**Search:**  
 CMBL only,  HUBs on CMBL,  HUBs not on CMBL  
 HUB Mentor Protege,  All Vendors

Vendor ID:

Vendor Number:

Vendor Name:  begins with  Name

Include Inactive Vendors:  Small Businesses Only:  Yes,  No

Selection 1: Class Code:  Item:  District:

Selection 2: Class Code:  Item:  District:

Selection 3: Class Code:  Item:  District:

Class Code | Item Code | District

Texas County:

City:  begins with

Zip:  begins with

Sort by:  Vendor Name

Output as:  Detail List

Results:  return all matches

Click this Help icon for information and tips on generating search lists and files

**Related Links**  
[CMBL Registration](#)  
[HUB Directory](#)  
[HUB Mentor Protege Agreement Listing](#)  
[Excluded Parties List System Search](#)  
[Debarred Vendors List](#)

## IX. Piggyback Contracts

This CPA contract type allows members to place “piggyback” orders on specific state agency contracts that are negotiated by CPA purchasers for specific open market purchases.

### How to Search

- The CPA piggyback contracts are linked from the CO-OP main page, or you can visit the page directly at: [www.window.state.tx.us/procurement//ompo/coop/index.html](http://www.window.state.tx.us/procurement//ompo/coop/index.html)
- Contracts are listed by class code and offer descriptions in the right hand column of each listing.
- The majority of these contracts are negotiated for the Texas Department of Transportation (TxDOT) and are very useful to counties and cities, although various state agency contracts are available on this page.
- Requisition Number
  - The first three digits of the requisition number represent the state agency number. TxDOT is 601 and the Texas Department of Criminal Justice is 696.
  - Many of the TxDOT contracts are awarded for a specific highway district. Find your highway district at: [www.cpa.state.tx.us/procurement/tools/proc\\_forms/bid\\_districts/](http://www.cpa.state.tx.us/procurement/tools/proc_forms/bid_districts/)
  - The next two digits in the requisition number represent the highway district, if applicable. For the TxDOT contracts, 44 represents a statewide contract.
  - For example, a requisition starting with 60101 would be a relevant piggyback contract for Highway District 1. 60144 would be a relevant piggyback contract for the entire state of Texas.

### How to Order

The contracts on the piggyback page have been competitively bid in accordance with state of Texas statutes, rules, policies and procedures and have been extended for the use of state agencies and active CPA CO-OP entities.

To make a purchase using these open-market purchase orders, you must send the vendor a local purchase order. The local PO must have:

- The state of Texas open-market purchase order number
- The state of Texas requisition number

No copy of the local purchase order needs to be sent to the CO-OP for this type of purchase.

## **X. Competitive Bid Support**

### **CPA Process**

For large purchasing requisitions, members may request CPA's assistance to competitively bid needed items (e.g., school buses).

Requests are considered on a case-by-case basis. Your organization will be asked to complete a requisition form for Open Market Bids to which you can attach your specifications. You may request to see the bids during the process; however, CPA purchasers will finalize the decision based on criteria determined with your purchasing team prior to posting the bid.

### **School Buses**

CPA works closely with the Texas Education Agency and Texas Department of Transportation on School Bus Specifications and approved vendors. CPA also performs school bus inspections. Forms for ordering school buses and the annual specifications are available in our CO-OP forms library at [www.window.state.tx.us/procurement/prog/coop/coopform/](http://www.window.state.tx.us/procurement/prog/coop/coopform/)

## **XI. Reverse Auctions**

CPA offers Reverse Auction services at no cost to members for large commodity purchases. This online service encourages suppliers to compete on price, achieving such savings as 25-30 percent compared to previous sealed bid rates for the same purchase type.

- [www2.cpa.state.tx.us/cat\\_page/cat\\_961\\_a2\\_0308.html](http://www2.cpa.state.tx.us/cat_page/cat_961_a2_0308.html)
- Statutory authority signed into law in 2001: Texas Government Code Section 2155.062 (a)(4)
- Term Contract 961-A2 with Orbis Online
- Buyers post requirements and challenge multiple suppliers to offer bids.
- Suppliers can see whether they have been underbid and have the opportunity to respond with multiple counter offers.
- The best deal can be the lowest price OR best value, other factors usually enter into the decision as well.

### **When to use**

- Orbis will help you determine whether your bid is suitable for reverse auction and will provide training.
- Key determination criteria are: competitive market, lot size, competitive specifications, sources of supply and your organization's requirements.
- Orbis' fee is built into vendor pricing; no exchange of funds between you and Orbis.

### **How to use**

- Reverse auctioning is preceded by an IFB defining the desired specifications
- Results of an event are delivered to the buyer to make an award determination
- Sample commodities and services:
  - Construction/Maintenance Equipment
  - Office, Printing and Packaging Supplies
  - Food Products
  - Security and Safety Equipment
- Savings Examples:
  - TxDOT Emergency Generator – savings of 32 percent over previous bids
  - TxDOT Ground Boxes – savings of 24 percent over previous bids

## **XII. Travel Contracts**

<http://www.window.state.tx.us/procurement/prog/stmp/>

The State Travel Management Program (STMP) of the state of Texas was created by the 70th Texas Legislature in 1987 (Texas Government Code 2171) to provide centralized management and coordination of state travel.

The STMP is designed to help state agencies and eligible CO-OP members make more efficient use of taxpayer dollars by assisting them in managing state travel expenditures, providing discounted travel services through vendor contracts and monitoring state travel activity.

Qualifying CO-OP members may use CPA contracts for travel cards, travel agency services, and discounted rates for official travel with major U.S. airlines, rental car companies, and over 1,000 hotels.

Contracts include:

- Rental car contracts
  - Advantage
  - Avis
  - Enterprise
- Hotels
  - Both in-state and out-of-state
- Travel Agency Services
  - National Travel Systems
- Airlines
  - Jet Blue
  - American Airlines
- Travel card program
  - JPMorgan Chase

Effective Sept. 1, 2004, Texas municipalities, school districts, public community/junior colleges, counties, county officers and employees, including county sheriffs, deputy sheriffs, emergency communication districts, and juvenile probation officers, traveling on official business may use the STMP's state contracts for travel services, provided these entities are participating in the Cooperative Purchasing Program of the Comptroller of Public Accounts.

Eligible Entities:

- County
- Emergency communication district
- Municipality
- Public junior/community college
- School district

### XIII. Electronic State Business Daily

The Electronic State Business Daily (ESBD), the bid posting Web site for the State of Texas, was created by Texas Government Code 2155.074 in 1998. CO-OP members have access to the ESBD to post their solicitations with an expected value exceeding \$25,000.

The ESBD is located at <http://esbd.cpa.state.tx.us>.

Solicitations and awards are searchable by entity type, requisition number, key word, and NIGP code.

The state agency posting requirements are as follows. Your entity's requirements may differ, so please consult your purchasing procedures.

#### **Estimated Procurement/Contract Amount**

Exceeding \$25,000:

If posting entire bid or proposal solicitation package

If not posting entire bid or proposal solicitation package

#### **Minimum days for Advertisement**

14 calendar days

21 calendar days

Bid notices include the following information:

- a short title and a brief description of the goods or services to be purchased and any applicable state product or service commodity codes for the goods and services;
- the last date and time on which bids, proposals or other applicable expressions of interest will be accepted;
- the estimated quantity of goods or services to be procured;
- the estimated date on which the goods or services will be needed;
- the name, business mailing address and business telephone number of the ordering entity point of contact to obtain all necessary information related to making a bid or proposal or other applicable expression of interest for the procurement contract;
- the agency's purchase requisition number; and
- any applicable documents, such as complete specifications, may be attached.

To gain access to the ESBD, please e-mail [esbdsupport@cpa.state.tx.us](mailto:esbdsupport@cpa.state.tx.us).

The screenshot shows the ESBD website interface. At the top, there is a green header bar with the text "Window on State Government" on the left and "Susan Combs Texas Comptroller of Public Accounts" on the right. Below the header, the main heading reads "Electronic State Business Daily (ESBD)". A breadcrumb trail indicates the current location: "You are here: Home » Procurement » Tools » Electronic State Business Daily".

The main content area features a "Browse Postings" section with a "View Newest postings" link. Below this, there are search filters: "Agency: Sort pulldown list by Name, Number | Lookup Agency Name" with a dropdown menu currently set to "(All Agencies)". The "Search Type" is set to "Search Bid / Procurement Opportunities". There are input fields for "Agency Requisition Number:" and "NIGP Class - Item Number: Class [ ] - Item [ ] (Item Number NOT Required)". The "Order Results By:" dropdown is set to "Agency", and a "GO >" button is visible.

## XIV. Glossary

- Advertise** – To make a public announcement of the intention to procure goods or services.
- Award** – The act of accepting a bid, proposal or offer, thereby resulting in a contract between the state and a vendor.
- Best Value** – The lowest total price at the highest quality.
- Bid** – An offer to contract with an entity, submitted in response to an Invitation for Bid (IFB)
- Centralized Master Bidder's List (CMBL)** – A mailing list, maintained by CPA, of vendors who have expressed interest and registered to receive notice of bid or proposal opportunities based on the products or services they provide.
- Piggyback Contracts** – Competitively awarded contracts in accordance with state of Texas statutes, rules, policies and procedures that have been extended for the use of other state agencies and active CO-OP members.
- CPA** – Texas Comptroller of Public Accounts
- Electronic State Business Daily (ESBD)** – A marketplace of procurement opportunities greater than \$25,000 posted on the Internet. State agencies are required to post in the ESBD procurement contract opportunities that will exceed \$25,000 in value.
- Emergency Procurement** – A situation requiring a state agency to make a purchase more quickly in order to prevent hazard to life, health, safety, welfare, or property or to avoid undue additional cost to the state.
- Free on Board Destination** – The process in which a title for purchased goods transfers to the ordering entity as soon as the ordering entity receives and accepts the goods.
- Invitation for Bid (IFB)** – A solicitation requesting submittal of a bid in response to the required specifications.
- Life Cycle Cost** – The total cost associated with buying, owning and using a physical product or service.
- National Institute of Governmental Purchasing (NIGP) Commodity/Service Codes** – Standardized national classification codes that identify goods and services.
- Negotiations** – A consensual bargaining process in which multiple parties attempt to reach an agreement on a disputed, or potentially disputed, matter.
- Professional Services** – Services directly related to professional practices as defined by the Professional Services Procurement Act, Texas Government Code § 2254.002.
- Proprietary** – Products or services manufactured or offered under exclusive rights of ownership, including rights under patent, copyright or trade secret law. A product or service is proprietary if it has a distinctive feature or characteristic which is not shared or provided by competing or similar products or services.
- Proposal** – An offer submitted by a vendor in response to a Request for Proposal (RFP) intended to be used as a basis to negotiate a contract.
- Purchase Order** – A signed written acceptance of an offer from a vendor. A purchase order may serve as the legal and binding contract between parties.
- Request for Information (RFI)** – An information gathering tool used when a purchaser cannot clearly identify product requirements/specifications.
- Request for Offer (RFO)** – an informal or formal solicitation method used when making procurements from automated information systems vendors to obtain offers or quotations of prices.
- Request for Proposal (RFP)** – A solicitation requesting submittal of a proposal in response to the required scope of services that usually includes some form of a cost proposal.
- Request for Qualification (RFQ)** – A tool used to determine the most qualified person(s) to perform professional services according to the Professional Services Procurement Act.

- Requisition** – An internal document the end user completes to request goods or services.
- Reverse Auctions** – A real-time bidding procedure that is conducted at a pre-scheduled time and Internet location in which multiple suppliers, anonymous to each other, submit bids for designated goods and services.
- Schedule** – A list of multiple award contracts from which agencies may purchase goods and services.
- Scheduled Purchase** – A purchasing method used for ordering goods in bulk.
- Sealed Bid** – A formal written bid opened in public at a designated time and place.
- Solicitation** – The process of notifying prospective vendors of an opportunity to provide goods or services to the state. Solicitations may be conducted via telephone, fax, mail, e-mail, or in person.
- Specification** – A concise statement of a set of requirements to be satisfied by a product, material, or service, indicating whenever appropriate the procedures to determine whether the requirements are satisfied.
- Statement of Work** – A statement outlining the specific services a contractor is expected to perform, generally indicating the type, level and quality of service, as well as the time schedule required.
- Term Contracts** – Competitively bid contracts for a specific time period and of indefinite quantity.
- Texas Multiple Award Schedule Contracts (TXMAS)** – Contract developed from contracts that have been competitively awarded by the federal government or any other governmental entity of any state. TXMAS contracts offer access to multiple vendors with preferred State of Texas customer pricing.
- TPASS** - Texas Procurement and Support Services, a division of the Texas Comptroller of Public Accounts.
- Vendor** – A supplier of goods and/or services to the state.