IOWA IMPACS

Iowa Management of Procurement and Contracts System

Request for Proposal (RFP) Step-by-Step Guide - DHHS

Table of Contents

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Iowa Management of Procurement and Contracts System

When the price is not the sole consideration for awarding a procurement contract, the Agency uses a Request for Proposal process. In this process, the award goes to the respondent whose proposal is determined to be most advantageous to the state in accordance with technical and price criteria outlined in the RFP.

See the DAS Central Procurement Policy and Procedures Manual for more details.

The RFP may require additional approvals from OCIO or IDOM in accordance with its policies.
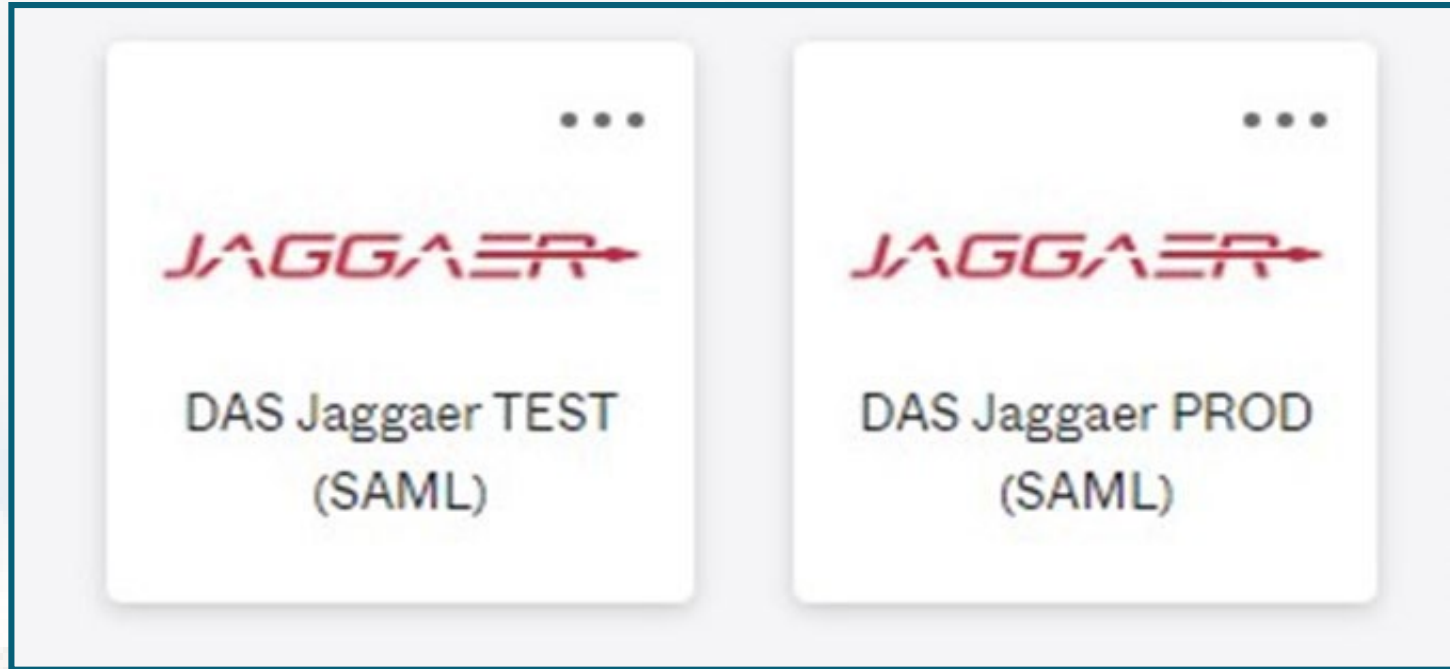
The competitive sealed RFP process includes the following steps:
1. Creating the Request for Proposal (RFP)
2. Posting the RFP on IMPACS and Bid Opportunities (Note: Bid Opportunities will be discontinued in February 2024)
3. Receiving and Opening the Proposals
4. Evaluating and Scoring the Proposals
5. Awarding the Contract
6. Negotiating the Contract
7. Generating the Contract

TSB Notification IAC 117.7(2)
Post all solicitations to the TSB web page at least 48 hours before the opening date and time in IMPACS. The TSB posting can be achieved in IMPACS by populating the "Release Date" field on the Setting page with a date at least 48 hours before the opening date and time. (February 2024)

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RFP Rules

Sign into Okta and locate the Jaggaer stickers
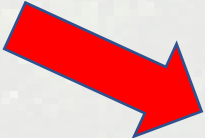

DAS Jaggaer TEST (SAML)

DAS Jaggaer PROD (SAML)

Best practice: Create an RFP in the IMPACS (Jaggaer) TEST UIT environment before posting in the Production (PROD) live site.

Menu

Expand to see menu icon labels by clicking the small arrow at the bottom.

Open the **Sourcing Menu**. Select the **Solicitations** Sub-menu and **Create New Event**.

Create New Event

You will see this pop-up screen ➡️

1. Enter the **Title** of the RFP.
2. Type in **HHS** (Agency) or search for your department by clicking the **Search** icon (magnifying glass).

Create Solicitation

About the Solicitation *(Step 1 of 2)*

Event Title *

Department *

Department Name

* Required

Next ›

(Optional) After clicking Search, you will see this pop-up screen →

Select the arrow next to the appropriate Department tree.

Departments

▸ ◯ Elected Officials
▸ ◯ INACTIVE
▸ ◯ Schools
▸ ◯ State of Iowa Cabinet Agencies
▸ ◯ State of Iowa Non-Cabinet Agencies

Selected Value

No Value Selected

Save Changes   Close

(Optional) Select the Department

There are three sections of the department tree:

1. Elected Officials
2. State of Iowa Cabinet Agencies.
3. State of Iowa Non-Cabinet Agencies.

Select the arrow next to the appropriate department tree, and drill down until you find the correct department. Click the radio button next to the department, then **Save Changes**.

In the adjacent illustration for Elected Officials, IDALS has several sub-departments under the main department.

Departments

- ◢ ○ Elected Officials
  - ◢ ○ Agriculture and Land Stewardship - IDALS
    - ○ Agriculture - Cattle Promotion
    - ○ Agriculture - Corn Promotion
    - ○ Agriculture - Development Authority
    - ○ Agriculture - Egg Council
    - ○ Agriculture - Soil Conservation
    - ○ Agriculture - Soybean Promotion
    - ○ Agriculture - Turkey Marketing Council
    - ○ Loess Hills Development & Conservation Authority
  - ▸ ○ Attorney General - Department of Justice
  - ○ Auditor of State
  - ▸ ○ Governor's Office
  - ▸ ○ Judicial Branch
  - ▸ ○ Legislative Branch
  - ○ Secretary of State - SOS
  - ▸ ○ Treasurer of State - TOS
- ▸ ○ INACTIVE
- ▸ ○ Schools
- ▸ ○ State of Iowa Cabinet Agencies
- ▸ ○ State of Iowa Non-Cabinet Agencies

Selected Value

No Value Selected

Save Changes   Close

Departments

- ▸ ○ Elected Officials
- ▸ ○ INACTIVE
- ▸ ○ Schools
- ◢ ○ State of Iowa Cabinet Agencies
  - ▸ ○ Administrative Services - DAS
  - ▸ ○ Corrections - DOC
  - ▸ ○ Economic Development Authority - IEDA
  - ▸ ○ Education -DE
  - ▸ ○ Health and Human Services - DHHS
  - ○ Homeland Security & Emergency Management - HSEMD
  - ▸ ○ Inspection, Appeals & Licensing - DIAL
  - ▸ ○ Insurance & Financial Services - DIFS
  - ▸ ○ Iowa Workforce Development - IWD
  - ▸ ○ Management - DOM
  - ▸ ○ Natural Resources - DNR
  - ▸ ○ Public Defense - DPD
  - ▸ ○ Public Safety - DPS
  - ○ Revenue - IDR
  - ▸ ○ Transportation - DOT
  - ▸ ○ Veterans
- ▸ ○ State of Iowa Non-Cabinet Agencies

Selected Value

No Value Selected

Save Changes   Close

Departments

- ▸ ○ Elected Officials
- ▸ ○ INACTIVE
- ▸ ○ Schools
- ○ State of Iowa Cabinet Agencies
- ◢ ○ State of Iowa Non-Cabinet Agencies
  - ○ Board of Parole
  - ▸ ○ Board of Regents
  - ○ Campaign Finance Disclosure Commission
  - ▸ ○ Department for the Blind
  - ○ Executive Council
  - ○ Iowa Communications Network - ICN
  - ○ Iowa Law Enforcement Academy
  - ○ Iowa Public Employees Retirement System - IPERS
  - ○ Iowa Utilities Division - IUB
  - ○ Office of Energy Independence
  - ○ Public Employment Relations Board
  - ○ Public Information Board
  - ○ Rebuild Iowa Office
  - ▸ ○ State Fair Foundation

Selected Value

No Value Selected

Save Changes   Close

(Optional) Select the Department

Click the **Search** icon (magnifying glass) to select the type of solicitation being created. Select the DHHS Event Type that applies.

Create Solicitation

About the Solicitation (Step 2 of 2)   ?

Event Type ★ ❓   Event Type   🔍

Create from Template   Template Name   🔍

★ Required   ‹ Previous   **Create Solicitation**

Select **DHHS - Request for Proposal.**

The **Template** will automatically populate.

Click on **Create Solicitation**.

Create Solicitation   ✕

About the Solicitation (Step 2 of 2)   📄 ?

Event Type ★ ❓   DHHS - Request for   ✕   🔍
                          Proposal

Create from Template ★   DHHS Generic RFP   ✕   🔍
                          Template

★ Required   ‹ Previous   **Create Solicitation**

Setup Wizard

Following the wizard on the left-hand side of the screen, IMPACS will walk the Issuing Officer (Buyer) through setting up the RFP.

RFP Test 003
401-RFP-HHS-0012-2024

| Type: | DHHS - Request for Proposal |
| Event Status: | Draft |

Settings and Content ⌄

Setup	⚠
Users	✔
Description	✔
Buyer Attachments	0
Vendors	0
Review and Submit	⚠

Tools ›

Setup

Event Actions ▾ | History

Event Title *   RFP Test 003

Event Type ❓   DHHS - Request for Proposal

Department   Health & Human Services - DHHS

Event Number *   401-RFP-HHS-0012-2024 ✏

⌄ Commodity Codes

Reporting Commodity Code   –   [Edit]

Additional Commodity Codes   –   [Edit]

Forced Vendor Invitation by Commodity Code   Yes

⌄ Display and Communication

Visible to Public   Yes

Public Event Short Description

200 characters remaining

Restrict Buyer Notifications   Yes

⌄ Dates

Time Zone   CDT/CST - Central Standard Time (US/Cent ⌄

Open Date *   [ ] 📅 🕐
mm/dd/yyyy hh:mm a

Close Date *   [ ] 📅 🕐

★ Required

[Save Progress] [Next ›]

Settings and Content

1. (Optional) The Buyer may change the Title of the RFP.

2. (Optional) The Buyer may change the RFP number by clicking the pencil icon. (IMPACS auto-generates a number by default).

3. By clicking on the **Edit** button next to the **Reporting Commodity Code** and **Additional Commodity Codes**, the Buyer may select the appropriate Commodity Codes for the RFP.

RFP Test 003
401-RFP-HHS-0012-2024

| Type: | DHHS - Request for Proposal |
| Event Status: | Draft |

Settings and Content ⌄

Setup ⚠

Users ✓

Description ✓

Buyer Attachments 0

Vendors 0

Review and Submit ⚠

Tools ›

Setup

Event Actions ▾ | History | 📄 | ?

Event Title ★　　　RFP Test 003　　　#1

Event Type ❓　　　DHHS - Request for Proposal

Department　　　Health & Human Services - DHHS

Event Number ★　　401-RFP-HHS-0012-2024 ✏　　#2

⌄ **Commodity Codes**

Reporting Commodity Code　－　　[Edit]　　#3

Additional Commodity Codes　－　　[Edit]

Forced Vendor Invitation by Commodity Code　　Yes

⌄ **Display and Communication**

Visible to Public　　Yes

Public Event Short Description

200 characters remaining

Restrict Buyer Notifications　　Yes

⌄ **Dates**

Time Zone　　CDT/CST - Central Standard Time (US/Cent ▾

Open Date ★

mm/dd/yyyy hh:mm a

Close Date ★

★ Required

[Save Progress] [Next ›]

Settings and Content

Commodity Codes

If the Buyer does not know the Commodity Code, then use the search box at the top of the Commodity Codes Menu that pops up when the Commodity Code **Edit** button is selected. There is also a PDF listing of all the Commodity Codes. You can find it here under **IMPACS Resources**: https://das.iowa.gov/iowa-management-procurement-and-contracts-system-impacs

Commodity Codes

Laptop ✕

🔍

| ← | → | Page 1 of 472 | 1-20 of 9422 Results | 20 Per Page ▼ |

Commodity Code	Description	
1000	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	Select
10000	BARRELS, DRUMS, KEGS, AND CONTAINERS	Select
10004	Baskets, All Types (Not Otherwise Classified)	Select
10005	Boxes, Crates, Baskets (Inactive, effective January 1, 2016)	Select
10006	Containers, Plastic, All Purpose)	Select
10007	Containers, Recycling	Select
10008	Covers, Drum, All Types and Sizes	Select
10009	Casks, All Types	Select
10010	Drum Spigots, Metal or Plastic	Select
10011	Crates, Plywood	Select
10015	Drums, Miscellaneous	Select
10020	Flip-top Cap Closures	Select
10021	Freight and Cargo Containers, Shipping, (See Class 640 For Boxes)	Select
10025	Gaskets, All Types: Barrels, Drums, Kegs, and Pails	Select
10030	Hazardous Material Containment and Storage,	Select

Close

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Commodity Codes

These are the Commodity Codes that appear when "Laptop" is entered in the search box.

Select the Commodity Code that best fits your RFP.

If additional Commodity Codes are needed for the RFP, then repeat the process for the **Additional Commodity Code** field on the **Setup page**.

The Vendor (Respondent) will be notified via email of this solicitation if they registered in IMPACS with the commodity code(s) selected for the RFP.

Commodity Codes

Laptop

Commodity Code	Description	
20454	*Microcomputers, Laptop, Notebook and Tablets	Select
20554	*Microcomputers, Handheld, Laptop, and Notebook, Environmentally Certified Products	Select
5567	Mounting Hardware: Laptops, GPS, Cameras, Electronic Devices, etc. Automotive.	Select
98424	Computers, Microcomputer, Handheld, Laptop and Notebook, Rental or Lease	Select

Close

Include a brief description of the Goods and/or Services you seek in the **Public Event Short Description** Section. You can expand the box by dragging the lower right-hand corner of the box.

RFP Test 003
401-RFP-HHS-0012-2024

Type:	DHHS - Request for Proposal
Event Status:	Draft

Settings and Content ⌄

Setup ⚠

Users ✔

Description ✔

Buyer Attachments **0**

Vendors **0**

Review and Submit ⚠

Tools ❯

Setup

Event Actions ▼ | History | 📄 | ?

Event Title *   RFP Test 003

Event Type ❓   DHHS - Request for Proposal

Department   Health & Human Services - DHHS

Event Number *   401-RFP-HHS-0012-2024 ✏

⌄ Commodity Codes

Reporting Commodity Code   -   [Edit]

Additional Commodity Codes   -   [Edit]

Forced Vendor Invitation by Commodity Code   Yes

⌄ Display and Communication

Visible to Public   Yes

Public Event Short Description

200 characters remaining

Restrict Buyer Notifications   Yes

⌄ Dates

Time Zone   CDT/CST - Central Standard Time (US/Cent ⌄

Open Date *   [   ] 📅 🕐
mm/dd/yyyy hh:mm a

Close Date *

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Display & Communication

Release Date (Future): Please ensure it is at least **48 hours** before the Open Date and time.

The current method is to post the RFP on Bid Opportunities 48 hours before the Open Date and time. By doing this, the solicitation is posted on the TSB website before opening to the public.

Open Date: Select the date and time the RFP will be open to the public.
Type in the date directly in the box or use the pop-up calendar by selecting the calendar icon. The clock icon will set the time.

Continue filling out the **Close Date**.

Save Progress to save and stay on the page, or **Next** to save and move to the next Section.

∨ Dates

Time Zone	CDT/CST - Central Standard Time (US/Cent ∨

Release Date ❓   [ ] 📅 🕐
mm/dd/yyyy hh:mm a

Open Date ★   [ ] 📅 🕐
mm/dd/yyyy hh:mm a

Close Date ★   [ ] 📅 🕐
mm/dd/yyyy hh:mm a

◄	December 2022	►

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

December 5, 2022

★ Required

Save Progress

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Users Section

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Event Creator - The field is automatically populated with the event creator.

Event Owners - You may add additional event owners here (see next page for search options). Depending on how your Department is set up, your department may have full control over this RFP as a default.

Contacts – additional contacts may be added here. The field is automatically populated with the event creator.

Stakeholders are Users interested in the solicitation but can only view it, not edit or respond to questions. This is a good place to list the requestor or evaluators.

Notification Recipients will receive IMPACS notifications, for instance, if a Vendor has submitted a question or if the RFP has been extended. The field is automatically populated with the event creator.

Most of the time, you will not need to change anything on this page.

Generic RFP Test
005-RFP-0311-2023

| Type: | **Request for Proposal** |
| Event Status: | **Draft** |

Settings and Content ⌄

Setup ⚠

Users ✓

Description ✓

Prerequisites ❷

Buyer Attachments ⓿

Vendor Attachments ✓

Questions ❹

Additional Item Fields

Price Components

Items ⓿

Vendors ⓿

Review and Submit ⚠

Tools ›

Users Event Actions ▾ | History | 📄 | ?

ⓘ Solicitations have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. When the limit is exceeded, solicitations can still be created and executed but not all users will receive notifications and e-mails.

Event Creator ★   Shannon, Laura

Event Owners ★   Event Owners have full control over this event: 👤 Edit Users

Shannon, Laura

Event Managers on this Department have full control over this event:

Role: Admin (2 users)

Role: Procurement (0 users)

Department: Department of Administrative Services (005) (13 users)

Contacts ★   Contact information for these users is shown to vendors: 👤 Edit Users

Shannon, Laura

Stakeholders   Stakeholders can view the event and responses: 👤 Edit Users

No User Selected

Notification Recipients ★   Only Notification Recipients will be eligible to receive system-generated event notifications.   👤 Edit Users

Shannon, Laura

★ Required

‹ Previous | **Save Progress** | Next ›

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Event Users

User Search

A **User Search** pop-up window will appear once the Edit Users button is selected (from the previous page). Search for the User in the **Search Box** and then click Select once the Buyer has been found.

Save Changes once the User(s) have been selected.

More Options		

< > Page 1 of 91   1-10 of 906 Results   10 Per Page ▼

Name

Brennan, Kelli A	Select
Buyer, Betty	Select
Test, Buyer	Select
Removed_7970691 (inactive)	Select
Jacobus, Todd	Select
Fitzgerald, Michael	Select
Woolery, Dale	Select
Pate, Paul	Select
Strawn, Matthew	Select
Bayens, Stephan	Select

< > Page 1 of 91   1-10 of 906 Results   10 Per Page ▼

Selected Values

No Values Selected

Save Changes   Close

Description Section

The **Description** Field is filled out with information about the RFP. Your template may have specific language pre-populated.

Pull down the slide icon to expand the field.

The Buyer may add to the existing language.

The formatting controls are similar to Microsoft Word.

Save Progress or **Next.**

RFP Test 003
401-RFP-HHS-0012-2024

Type: **DHHS - Request for Proposal**

Event Status: **Draft**

Settings and Content ⌄

Setup ⚠

Users ✓

Description ✓

Buyer Attachments [0]

Vendors [0]

Review and Submit ⚠

Tools ›

Description

Copy from Library

Please enter a description for this event, or copy from library. ★

Format ▼ | (inherited font) ▼ | (inherited size) ▼ | **B** *I* U abc | A ▼ | ◊ ▼ | ☰ ☰ ☰ ☰ | ☰ ☰ ☰ | ∞ 🖼

X₂ X² | ▦ | ‹/›

Do not upload proposals or questions to this system. Follow the submission instructions in the attached document to ask questions and/or to submit a proposal directly to the Department of Health and Human Services. Do **NOT** submit proposals electronically to this system.

☰

★ Required

‹ Previous | **Save Progress** | Next ›

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Description

Buyer Attachments

Location for Purchasing Agent/Issuing Officer Attachments to the Respondents. Attach RFP Document here

Buyer Attachments Section - This is where the Buyer will upload the RFP document.

Click on the **Add Attachment** button to add the RFP Document and any other relevant files or links. Click the **Add New Attachment** button to upload more attachments or links. Make the RFP document FIRST in the list by changing the **Display Order**.

Clicking the **Actions** button will allow you to Edit, Download or Delete the Attachment.

Buyer Attachments   Event Actions ▼ | History | ?

[Add Attachment ▼]

Attachment △	Version △	Size △	Added By △	Modified Date △	
⬇ IMPACS Generic RFP Template.update 120823.docx	1	70 KB	Laura Shannon	1/3/2024 1:54:57 PM	Actions ▼

[‹ Previous] [Save Progress] [Next ›]

Buyer Attachments   History | ?

[Add New Attachment]

1-8 of 8 Results   10 Per Page ▼

Attachment △	Size △	Added By △	Modified Date △	
⬇ RFP - Exceptions Form.docx	20 KB	Laura Shannon	1/10/2023 9:34:02 AM	Actions ▼
⬇ Terms and Conditions for Federal Compliance.pdf	165 KB	Laura Shannon	11/21/2022 9:53:00 AM	Actions ▼
⬇ GOODS Terms and Conditions 05.1.16.pdf	223 KB	Laura Shannon	1/10/2023 11:11:16 AM	Edit Properties
⬇ Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	130 KB	Laura Shannon	1/10/2023 11:11:16 AM	Download / Delete

Add Attachment   ☒ Clo

Attachment Type *   ⦿ File   ○ Link

File *   [Select files... | Drop files to attach, or browse.]
                 Maximum upload file size: 200.0 MB

Comments   [   ]
                 1000 characters remaining

Display Order * [Last   ▼]

* Required   [Save Changes] [Close]

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Buyer Attachments

If there are Vendors that have registered under the Commodity Codes that were entered earlier in the Setup Section, then you will see the number of Vendors that will be notified when the RFP opens.

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The Buyer may add Vendors to be notified manually.

Under the **Add Vendors to Event** Tab, a Search Window opens, allowing the Buyer to search for Vendors registered in the IMPACS system.

Enter the information and click **Search**.

If the Vendor is registered, then the results will show the Vendor's name and contact information.

(Optional) add a contact by clicking the Add Contact button.

Click **Add to Event** to add the Vendor. They will receive an email notification of the RFP.

Add Vendors to Event by Searching

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The Buyer may also fill out a pop-up window or a template with the names of the unregistered Vendors they would like to add to the RFP.

Click on the Manually Invite Vendors Dropdown box.

Select **Add Vendor to Event**

Repeat as necessary by clicking **Save and Add Another** or **Save** to move on.

If you have many unregistered vendors to add, then you may download the template, fill it out, and import it back to IMPACS.

Click the **Manually Invite Vendors** button and **Get Import Template**.

Vendors

Event Actions ▼ | History | ?

Vendors Invited by Commodity Code (0)   Additional Vendors (0)   Add Vendors to Event   Add Vendors From Group

Manually Invite Vendors ▼

Import
Get Import Template

Add Vendor to Event

Search Registered Vendors

Vendor	
Relationship	All ▼
Vendor Contact	
Zip Code	Within 5 Miles ▼
Commodity Code	– Edit
NAICS Code	Type to filter... 🔍

Clear   🔍 Search

Add Vendor to Event ✕

Vendor Name *

Sales or Corporate Contact Name

Email *

* Required   Save   Save and Add Another   Close

Add Vendors to Event – Manually Invite

Once the Template is downloaded, the Buyer will see an **Instructions Page** and the **Import Data Page**.

Fill out the **Import Data Page** with the Vendor information.

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When the spreadsheet is ready, navigate back to the **Vendors** main page and select **Manually Invite Vendors - Import Vendors.**
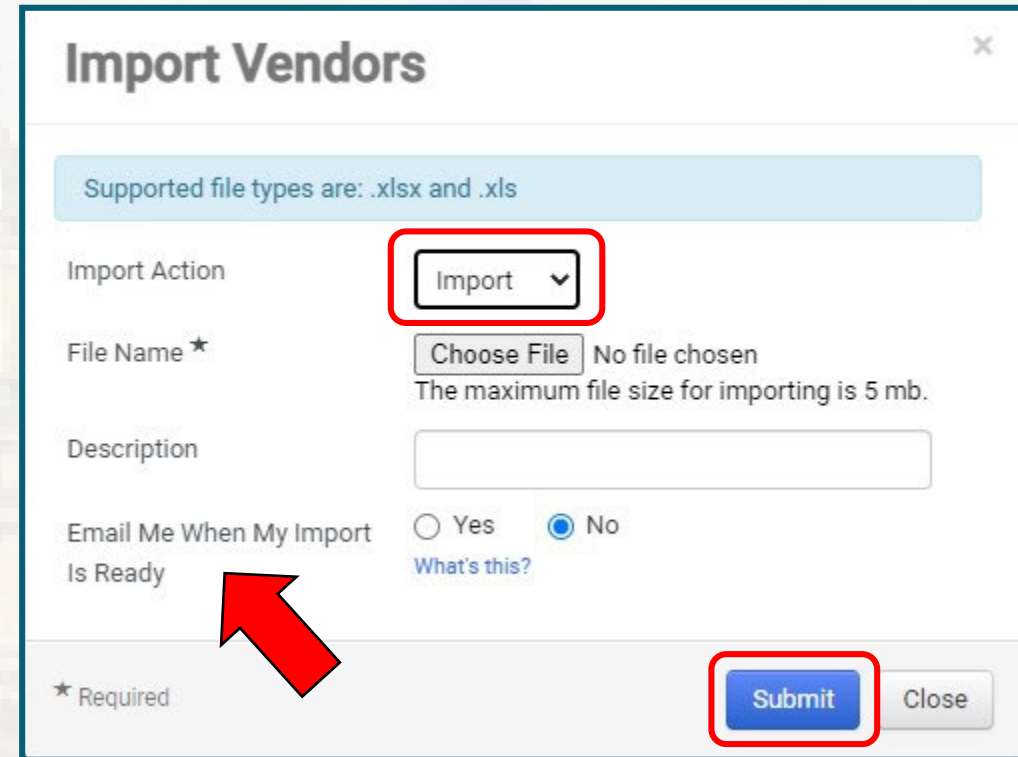
For **Import Action**, Select **Validate.**

This action will validate the email address and make sure that it is a valid email address.

Import Vendors

Supported file types are: .xlsx and .xls

Import Action	Validate ⌄
File Name *	Choose File No file chosen The maximum file size for importing is 5 mb.
Description	
Email Me When My Import Is Ready	○ Yes ● No What's this?

★ Required

Submit   Close

It might take a few minutes for IMPACS to validate the spreadsheet. You may track the progress of the validation process under the **Tools Menu – Exports and Imports** on the left side of the screen.

Refresh the page often.

Download the validated file and save it to your computer.

RFB 17 Test 002
005-RFB-0240-2023

| Type: | **Request for Bids** |
| Event Status: | **Draft** |

Settings and Content >

Vendor Responses >

Tools ⌄

Internal Notes

Exports and Imports

Q & A Board

Approvals

Award Notifications

Exports and Imports

Event Actions ⌄ History ?

ⓘ Exports and Imports will be deleted 7 day(s) after creation.

Looking for this Event exported as a PDF? Go to View Exports

Refresh this Page

Delete Selected

Type △	Collateral △	Description △	Requested By	Requested At ▼	Status △	File △	☐
Validate	Vendors		Laura Shannon	12/19/2022 1:18 PM	Pending		

‹ Back to Results   7 of 40 Results ⌄ ‹ ›

RFB 17 Test 002
005-RFB-0240-2023

| Type: | **Request for Bids** |
| Event Status: | **Draft** |

Settings and Content >

Vendor Responses >

Tools ⌄

Internal Notes

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Award Notifications

Exports and Imports

Event Actions ⌄ History ?

ⓘ Exports and Imports will be deleted 7 day(s) after creation.

Looking for this Event exported as a PDF? Go to View Exports

Refresh this Page

Delete Selected

Type △	Collateral △	Description △	Requested By	Requested At ▼	Status △	File △	☐
Validate	Vendors		Laura Shannon	12/19/2022 1:18 PM	Completed	⬇ manuallyInviteSuppliersTemplate (4).xls	☐

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Add Vendors to Event – Manually Import

When the Buyer is ready to import the validated file, navigate back to the **Vendors** main page and select **Manually Invite Vendors - Import Vendors.**

For **Import Action**, Select **Import.**

The Buyer may track the progress of the Validation Process under the **Tools Menu – Exports and Imports** on the left side of the screen.

Refresh the page often.

Or, you may select **Email Me When My Import Is Ready**, and the Buyer will receive an email when the file is ready.

Click **Submit.**

Import Vendors

Supported file types are: .xlsx and .xls

Import Action [Import ⌄]

File Name ★ [Choose File] No file chosen
The maximum file size for importing is 5 mb.

Description [ ]

Email Me When My Import Is Ready ○ Yes ● No
What's this?

★ Required [Submit] [Close]

The number of additional Vendors – manually invited - will be indicated in parenthesis in the **Additional Vendors** tab.

The Vendor information will be listed under the tab. The Buyer may remove a Vendor here.

Save Progress or **Next**.

Vendors

Event Actions ▼ | History | ?

Vendors Invited by Commodity Code (0)　　Additional Vendors (1)　　Add Vendors to Event　　Add Vendors From Group

1 Event Vendors

Vendor Name	Doing Business As	Sales and Corporate Contacts	Action
SOIJAGGAERTEST		Laura Shannon (Sales) SOIJAGGAERTEST@gmail.com Add Contact	Remove

‹ Previous　　**Save Progress**　　Next ›

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Add Vendors to Event

Review and Submit

Errors and Approval

The last step is to **Review and Submit**.

If there are errors, an error message will appear and indicate the error to be corrected. The error language is a link that will take you back to the item in question.

After the error is corrected, be sure to **Save Progress** on that page.

Once all errors have been addressed, click **Submit for Approval.** The Solicitation should automatically be approved based on DHHS approval workflow settings.

Review and Submit

Event Actions ▾ | History | ?

ℹ Solicitations have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. When the limit is exceeded, solicitations can still be created and executed but not all users will receive notifications and e-mails.

⚠ Please complete all required sections to submit this event.

Section	Progress	Action Needed on the Following
Setup	⚠ Incomplete	⚠ Q&A Submission Close Date ⚠ Open Date ⚠ Close Date
Users	✔	Required Fields Complete
Description	✔	Required Fields Complete
Prerequisites	3	No Required Data
Buyer Attachments	8	No Required Data
Vendor Attachments	✔	No Required Data
Questions	39	No Required Data
Items	0	No Required Data
Vendors	2	Required Data Provided

> View Approval Steps

‹ Previous   Submit for Approval

Review and Submit

Event Actions ▾ | History | ?

ℹ Solicitations have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. When the limit is exceeded, solicitations can still be created and executed but not all users will receive notifications and e-mails.

✔ All sections are complete. You may submit your event for approval.

Section	Progress
Setup	✔ Required Fields Complete
Users	✔ Required Fields Complete
Description	✔ Required Fields Complete
Prerequisites	3 No Required Data
Buyer Attachments	8 No Required Data
Vendor Attachments	✔ No Required Data
Questions	39 No Required Data
Items	0 No Required Data
Vendors	2 Required Data Provided

> View Approval Steps

‹ Previous   Submit for Approval

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Review and Submit

To check the Approval Status, click the **Return to My Event** hyperlink.

✅ **Event Submitted for Approval**

Next Steps

What would you like to do next? Here are links to common actions:

- Return to My Event
- Add Another Event
- Go to My Home Page
- Go to Sourcing Dashboard

› **View Approval Steps**

Event Summary

Event Title	RFP Test 003	Time Zone	CDT/CST - Central Standard Time (US/Central)
Event Type ❓	DHHS - Request for Proposal	Open Date	5/1/2024 8:00:00 AM
Department	Health & Human Services - DHHS	Close Date	6/1/2024 2:00:00 PM
Event Number	401-RFP-HHS-0012-2024		
Event Status	Approved		

To check the approval, Navigate to **Tools>Approvals** to see if the approval workflow has been completed.

Before the solicitations is **Released**, you may click the **Workflow Actions** button in the upper right corner to return the Solicitation to draft status to make edits. You may also cancel the Solicitation altogether.

This event is **Approved**. It will be opened to vendors on 5/1/2024 8:00 AM CDT.

Workflow Actions ▼

Cancel Event

Return to Draft

RFP Test 003
401-RFP-HHS-0012-2024

Type: **DHHS - Request for Proposal**

Event Status: **Approved**

Settings and Content ›

Tools ∨

Internal Notes

Exports and Imports

Q & A Board

Approvals

Approvals

Solicitation Approval Workflow   Solicitation Evaluation Workflow

Show skipped steps ☐

Orientation   Horizontal ▼

⇒ Submitted
1/5/2024 2:56 PM

✓ Completed
1/5/2024 2:56 PM

Approvals and Workflow Actions

Workflow and Event Actions

Amend, Extend, Cancel

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After the Solicitation is **Released**, the following options are available:

The **Workflow Actions** dropdown in the upper right corner has the following options: **Amend the Solicitation, Close the Solicitation Early, and Withdraw the Solicitation**

Workflow Actions ▼

Amend

Close Early

Withdraw Event
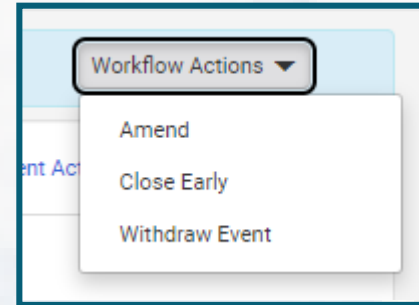
The **Event Actions** dropdown in the upper right corner has the following options: **Copy the Solicitation, Export the Solicitation as a PDF, and Extend the Solicitation**

Event Actions ▼ | History | 📄 | ?

Copy

Copy As Template

Extend Event
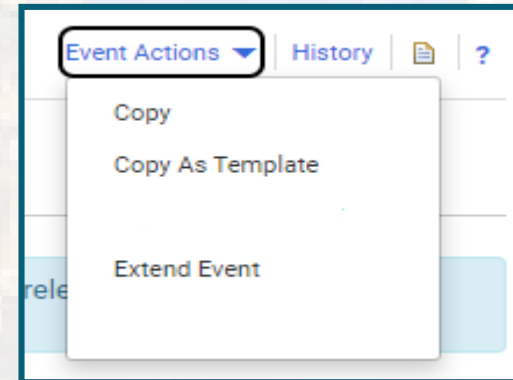
Follow the instructions that pop up after selecting an action. If you amend the solicitation, you must go through the approval process again.

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Workflow and Event Actions

Questions?

Please contact laura.Shannon@iowa.gov

Or call 515-330-7325

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Questions?