Major Contract Reporting

Instructions for State Agencies

Legislative Budget Board

January 2009

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Overview

The Texas Legislature requires state agencies, with certain exceptions, to report major contracts awarded on or after October 1, 2007, to the Legislative Budget Board (LBB). For more information, see Sec. 322.020 of the Government Code.

State agencies must report all contracts, as well as requests for proposal, invitations to bid, and comparable bid solicitations related to major contracts, and amendments, to the LBB using the State Contracts application. This document contains instructions for using this application.

Agencies enter information about each bid solicitation, contract, or amendment; attach a searchable PDF of the documents (if not an exempt agency); and submit the information and file. Any portion of the PDF file that is not subject to disclosure under Chapter 552 (Government Code, Title 5, Subtitle A, Chapter 552, Public Disclosure) should be redacted out of the PDF file and an appendix attached that generally describes the information without disclosing the specific content before providing the searchable PDF to the LBB.

The searchable database of contracts and bid solicitations is available on the LBB's website for public access. The database displays contracts, bid solicitations, and related information as submitted to the LBB.

Contracts awarded prior to January 9, 2009, should be posted within 60 days (March 10, 2009). Contracts awarded on or after January 9, 2009, should be posted within 10 days of award.

The following are exempt from providing the PDF file attachment:

- university systems;
- institutions of higher education;
- the Texas Department of Transportation;
- the Health and Human Services Commission;
- the Department of Aging and Disability Services;
- the Department of Assistive and Rehabilitative Services;
- the Department of Family and Protective Services; and
- the Department of State Health Services.

These agencies still need to enter contract, bid solicitation, and amendment information but do not have to attach the contract or bid solicitation files.

Contacts at the LBB

If you have a problem using the State Contracts application that you cannot resolve using this document, please call the LBB's Application Support Help desk at 512-463-3167.

Getting Access

To use the State Contracts application, you must have a user ID and password, which you request online, following the steps below.

If you already have access to other LBB applications such as ABEST, Fiscal Notes, or Revenue Survey (NCR), your user ID and password for State Contracts will be the same, but you still must request access for your login information to work in the new application.

1. On the LBB website (http://www.lbb.state.tx.us), click the link labeled **State Contracts Logon Request Form**, as shown below.

2. Fill out the logon request form, shown below.
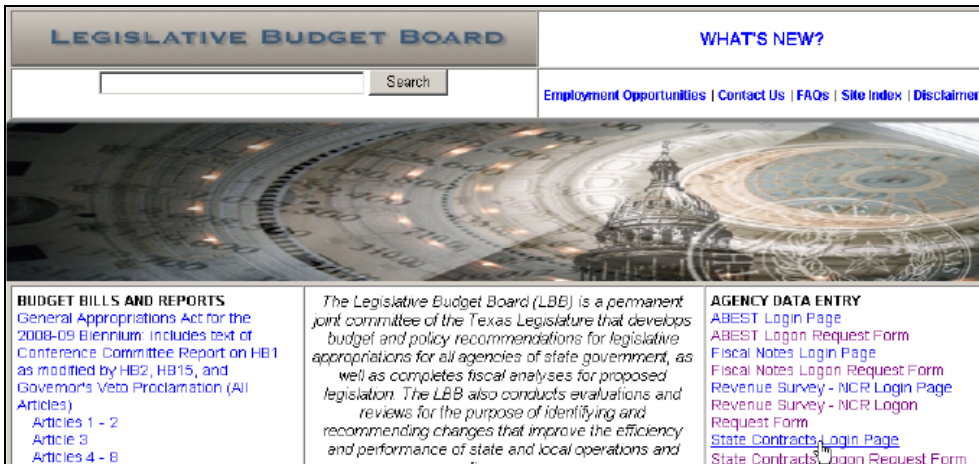
3. After completing the form, scroll down and click **Submit**. The LBB will email your user ID and password within one business day.

Logging In

1. Go to the LBB's website (http://www.lbb.state.tx.us) and click the link labeled **State Contracts Login Page**, as shown below.

2. This opens the State Contracts login screen, shown below.

3. Enter your user name and password in the fields.

4. Click **Log In** or press **Enter** on your keyboard.

Entering Contract-Related Data

Once you log in, this application will stay open for 20 minutes after the last time you save your data before it times out from inactivity. Save often!

If it times out, click **Login**, as shown below, and resume data entry.

You may click **Save** at the bottom of the screen at any time, before submitting the information to the LBB. Once you save, the screen changes from the **Initial Contract Information** screen to the **Edit Contract Information** screen, allowing you to make changes.

Red asterisks next to text fields indicate required information.

Entering Contract Information

1. After logging in, the **Initial Contract Information** data entry screen appears. Your agency name should appear in the drop-down **Agency** field, shown below.

    If you are responsible for entering data for multiple agencies, select the agency for which you want to enter data first, using the drop-down list.

2. Select the **Contracts** document type from the drop-down list, as shown below. Invitations to bid, requests for proposal, and requests for quotation require a subset of the contract information.

3. Enter the contract ID number in the field shown below. This is a unique number that your agency uses to track contracts.

4. Select a category from the drop-down list, as shown below. There are six categories shown, with the relevant section of the Government Code shown for each. To learn more about the categories, click **Descriptions of Statutes**.

5. Enter the purpose of the contract. This field holds 50 characters; note that a character counter appears in the bottom left corner of the window, shown below.

6. Enter the date the contract was awarded in mm/dd/yyyy format. You may click **Display Calendar** to open a calendar and select a date, as shown below. Navigate with the **< and >** icons at the top of the calendar. Click a day to enter it in the field.
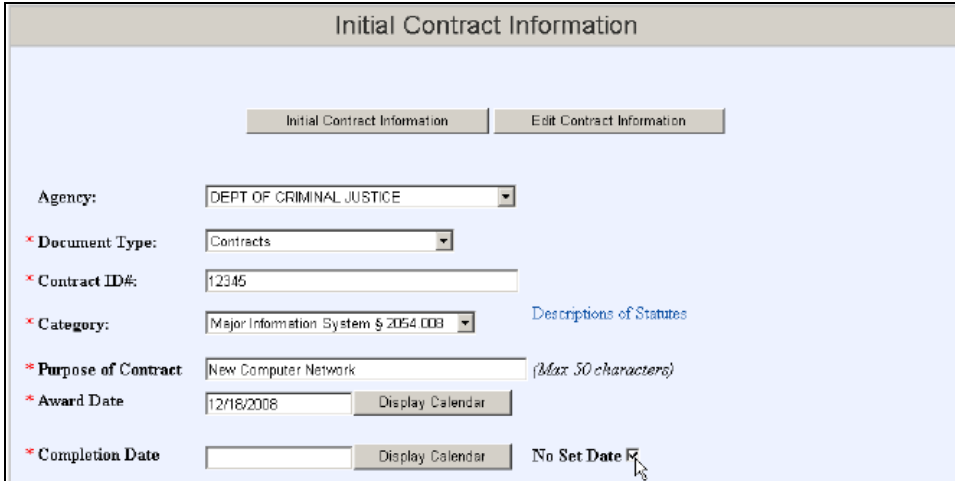
7. Enter the **Completion Date** in mm/dd/yyyy format. You may click **Display Calendar** to open a calendar and select a date.

    If this contract is open-ended, check the **No Set Date** box, as shown below.

8. Enter a vendor from the list by clicking the initial letter of the vendor's name.

Select the vendor from the drop-down list, shown below.

If the vendor is not listed, click **Add Vendor** and enter the vendor's name and address in the fields, shown below.

9. You may enter information describing the purpose of the contract in the optional **Explanation** field, shown below after Step 13. Please be descriptive and avoid using acronyms.

10. You may enter information about available alternatives for performing the contracted service in the **Alternatives** field, also optional, shown below. Please be descriptive if there are alternatives. Please avoid using acronyms.

11. Enter the amount of the contract in the **Amount** field, shown below. It is not necessary to enter a dollar sign or commas. Amounts with cents are rounded to whole dollars, once submitted.

12. Contracts may split across several files. You may only add PDFs, so if you have not converted the original contract document(s) to PDF, do so now. Click **Save** to save the data you've entered so far.

    If the contract is a single PDF file, enter 1 in the **Number of Attachments to Add** field. If the contract has multiple files, enter the number of files, shown below.

    Note that if any portion of the contract you submit is redacted (not subject to disclosure under Chapter 552, as explained in the **Overview** section of this document), you must submit an appendix, in the form of a PDF file, that generally describes the redacted information without disclosing the specific content.

    Note that exempt agencies (those specifically identified in Sec. 322—see **Overview**) must submit contract and bid solicitation information but do not have to attach contract (or bid solicitation) files.

13. Click **Add Attachments**, as shown below.

14. The attachment screen displays fields for adding the attachments you selected above.

15. Click **Browse** to search your directories. Select the PDF file(s) to attach.

16. If the attachment is an amendment of the original contract, click the **Amendment** box, seen above.

17. Click **Attach Documents & Return** to return to the data entry screen. Click **Return to Edit Screen without Saving** if you need to return to the previous screen without attaching a file. Click **Refresh Current Screen** to cancel any data you have entered.

18. Review the information on the data entry screen and make changes if necessary. Click **Save** to save the information.

19. When the information is correct and the file(s) attached as applicable, click **Submit to LBB** on the data entry screen. Once submitted, you can reopen the document (see **Reopening Contracts**) and edit all data except the document type, contract or bid ID, and category.

Entering Bid Solicitation Information

These steps apply to invitations to bid, requests for proposal, and requests for quotation. The process is similar to entering contracts, except that there is no vendor information to enter and no explanatory, alternative, and amount fields.

Refer to the **Entering Contract Information** section for details on the bid solicitation fields that are the same as for contracts.

1. After logging in, the **Initial Contract Information** data entry screen appears. Your agency name should appear in the drop-down **Agency** list, shown below.

   If you are responsible for entering data for multiple agencies, select the agency for which you want to enter data first.

2. Select either the invitation to bid, request for proposal, or request for quotation document type from the drop-down list, as shown below. Contracts require different information.

3. Enter the bid ID number. This is a unique number that your agency uses to track contracts.

4. Select a category from the drop-down list. There are six categories shown, with the relevant section of the Government Code shown for each. To learn more about the categories, click **Descriptions of Statutes**.

5. Enter the purpose of the bid. This field holds 50 characters; note that a character counter appears in the bottom left corner of your screen.

6. Enter the start date of bidding in mm/dd/yyyy format. You may click **Display Calendar** to open a calendar and select a date.

7. Enter the due date for bidding in mm/dd/yyyy format. You may click **Display Calendar** to open a calendar and select a date.

8. Bid solicitations may be split across several files. You may only add PDFs, so if you have not converted the original document(s) to PDF, do so now. You may want to click **Save** to save the data you've entered so far.

    If the document is a single PDF file, enter 1 in the **Number of Attachments to Add** field. If the bid solicitation has multiple files, enter the number of files.

    Note that if any portion of the bid solicitation you submit is redacted (not subject to disclosure under Chapter 552, as explained in the **Overview** section of this document), you

must submit an appendix, in the form of a PDF file, that generally describes the information without disclosing the specific content.

Note that exempt agencies (those specifically identified in Sec. 322—see **Overview**) do not have to attach contract (or bid solicitation) files.

9. Click **Add Attachments**. The window displays fields for adding the attachments you selected.

10. Click **Browse** to search your directories. Select the PDF file(s) of the bid solicitation.

11. If the attachment is an amendment of the original document, click the **Amendment** box.

12. Click **Attach Documents & Return** to return to the data entry screen. Click **Return to Edit Screen without Saving** if you need to save your data while you find the PDF to attach. Click **Refresh Current Screen** to return to the previous screen without attaching a file.

13. Review your information and make changes if necessary. Click **Save** to save the information.

14. When the information is correct and complete and file(s) attached as applicable, click **Submit to LBB**. Once submitted, you can reopen the document (see **Reopening Contracts**) and edit all data except the document type, contract or bid ID, and category.

Editing Contract or Bid Solicitation Information

Once you save either contract data or bid solicitation data, the information is stored for you to revise before submitting to the LBB.

1. After logging in, click **Edit Contract Information** at the top of the screen, as shown below.
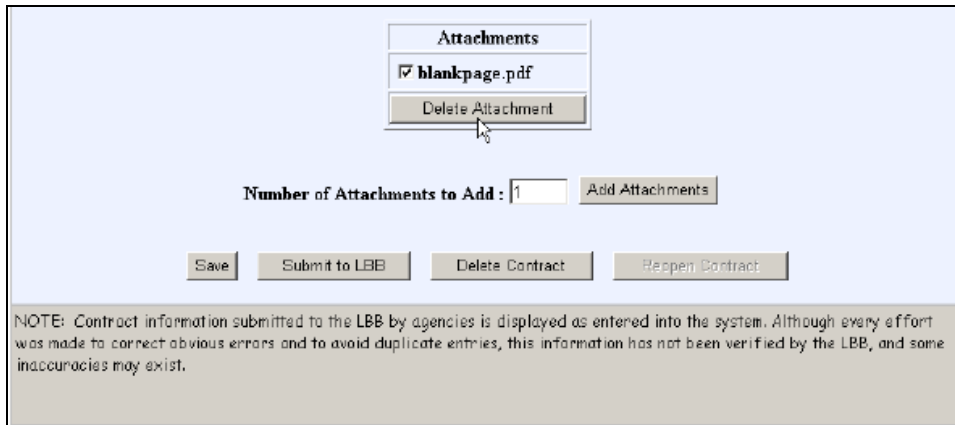

The screen title changes to **Edit Contract Information**, as shown below.

2. Select the agency, if applicable.

3. Select the document type from the drop-down list, which displays each document type that has been saved for this agency so far.

4. Select the bid or contract ID number from the drop-down list.

5. The remaining fields, which have a gray appearance, may be revised.

6. You may delete attachments and replace them with different attachments. Check the attachment you wish to delete and click **Delete Attachments** as shown below.
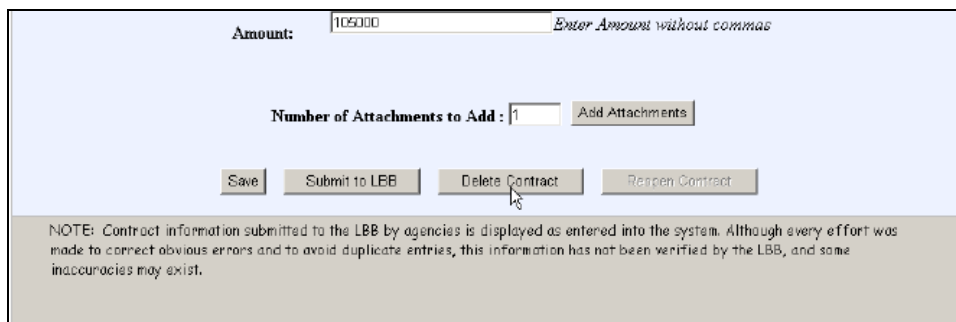

Click **Add Attachments** to browse to and select the correct attachment(s).

7. Click **Save** to save your changes.

8. Click **Submit to LBB** to submit the information to the LBB database.
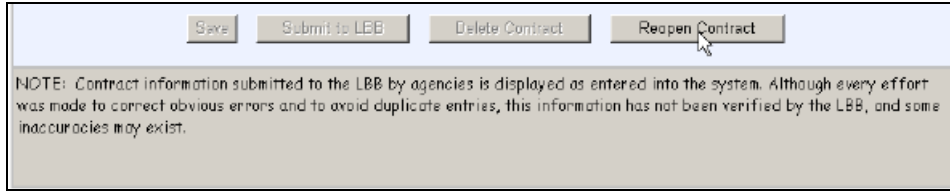
Deleting Contracts

If you need to change the information in the agency, document type, or ID fields for either a contract or bid solicitation, select it using the instructions under **Editing Contract or Bid Solicitation Information**. Scroll down and click **Delete Contract** at the bottom of the screen, as shown below, and start over on data entry.

Reopening Contracts

Once you have submitted a contract or bid solicitation to the LBB, you may reopen it and make changes by clicking **Reopen Contract**, as shown below.

After reopening a contract or bid solicitation, you may edit it using the instructions in the section **Editing Contract or Bid Solicitation Information**.