PROCUREMENT OFFICER
USER GUIDE

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1   Introduction to Maryland Procurement

1.1   Background and Purpose

Public procurement has a fiduciary responsibility to effectively manage purchases and contracts. The Maryland Office of State Procurement (OSP) operates as a strategic authority to obtain the overall best value for the State and provides an effective oversight for state leadership.

The OSP was established on October 1, 2019, within the Department of General Services (DGS) with a Governor-appointed State Chief Procurement Officer. It started with the Commission to Modernize Maryland State Procurement's report and recommendations and followed the Plan to Implement the Reorganization of State Procurement House Bill 1021, Chapter 590, Laws of 2017.

1.2   Maryland Procurement Academy

The Maryland Procurement Academy (MDPA) provides training and performance support resources for Maryland's procurement professionals. Subject Matter Experts (SMEs) and Certified Instructors provide education, training, and statewide certification for State procurement professionals, as well as those from Maryland municipalities, colleges, and universities. Additionally, the MDPA provides training and certification programs for Maryland's Vendors. The MDPA's goal is to enhance efficiencies, ensure ethical behaviors, develop quality personnel, and support Maryland Procurement throughout the entire state.

1.3   Procurement Foundations

1.3.1 NASPO

https://www.naspo.org/ProcurementToolbox
The National Association of State Procurement Officials (NASPO) is an American non-profit organization created by the leading procurement officials from each state. They work to solidify the procurement community through research, education, and communication. The State of Maryland is a member of NASPO.

If you are new (or newer) to procurement, the NASPO Procurement Toolbox is a great place to start learning about procurement. Visit the Toolbox (link above) and read, at a minimum, the first five issues. This toolbox provides valuable graphics and comprehensive explanations about procurement, marketing, contracts, solicitation methods, ethics, and more. Please keep in mind that your agency or organization may have additional or specific processes, terminology, or information requirements.

2 Maryland Procurement Manual

https://procurement.maryland.gov/wp-content/uploads/sites/12/2020/05/MarylandProcurementManual.pdf

The Maryland Procurement Manual is your guide to State procurement and related best practices; but remember, your own organization may require additional information and procedures. The Maryland Procurement Manual addresses common procurement methods in the state, required forms and processes, etc.

To download a PDF version of the Maryland Procurement Manual, visit our Maryland procurement page by clicking the link above. **Please keep in mind that the webpage is often updated before the updated PDF version is published.** Make sure to visit this site often to remain current.

3 The Procurement Staff Page

https://procurement.maryland.gov/procurement-staff/

The Procurement Staff Page provides information for ALL procurement professionals and related staff working in state agencies, departments, and organizations. This includes documents such as timelines, checklists, schedules, templates, and information needed to complete procurements. It also offers contact information for procurement-related questions. Information on this site is updated often, so check back frequently. Significant items found on this webpage are listed below.

3.1 Timelines & Checklists for Competitive Sealed Bidding (CSB) & Competitive Sealed Proposals Procurement Manual

This downloadable spreadsheet shows you how to schedule and structure your IFB and RFP procurements. It contains the estimated time for completion of steps in the procurements, a checklist for requirements, as well as links to other information and data for procurements.

3.2 Statewide Request for Proposal (RFP) Template

This downloadable template lets you enter data for your RFP solicitation. Procurement Officers (POs) download these templates, fill in the appropriate procurement information, and upload them in eMMA as an RFP attachment to their project solicitation.

3.3   Statewide Invitation for Bid (IFB) Template

This downloadable template lets you enter data for your IFB solicitation. POs download these templates, fill in the appropriate procurement information, and upload them in eMMA as an IFB attachment to their project solicitation.

3.4   Solicitation Attachments and Appendices

https://procurement.maryland.gov/rfp/

This section of the webpage on the Maryland Procurement site provides links to attachments and important documents needed to complete procurement projects.

Table 1 - Terminology	
Attachment C	Bid Proposal Affidavit
Attachment D	Minority Business Enterprise (MBE) Forms
Attachment E	Veteran-Owned Small Business Enterprise (VSBE)
Attachment F	Living Wage Affidavit
Attachment G	Federal Funds Attachment
Attachment H	Conflict of Interest Affidavit
Attachment I	Non-Disclosure Agreement (Contractor)
Attachment J	HIPAA Business Associate Agreement
Attachment K	Mercury Affidavit
Attachment L	Performance of Services Disclosure
Attachment N	Contract Affidavit
Attachment O	DHS Hiring Agreement
Exhibit 1 Template	MBE, VSBE, SBR Research Factors

Table 2 - Appendices	
Appendix 2	Bidder/Offeror Information Sheet
Appendix 3	Non-Disclosure Agreement
Appendix x	Labor Categories
Appendix xx	Labor Resume Form
Appendix y	Bid Proposal Bond

Table 2 - Appendices	
Appendix yy	Payment Bond
Appendix z	Performance Bond

3.5   Contract Modification with Mandatory Terms and Conditions (Ts&Cs) Template (for small procurements)

This downloadable template is used when a procurement has been awarded as a small procurement, but a modification is necessary that will take it over the small procurement threshold. When you are finished, scan the document, and upload it to your contract in eMMA as you process the contract modification.

4   The eMaryland Marketplace Advantage (eMMA)

https://emma.maryland.gov

The eMaryland Marketplace Advantage (eMMA) is the State of Maryland's eProcurement procure-to-pay (PTP) system. It provides all state agencies and organizations with the technology to deliver multi-jurisdictional efficiency and transparency, reduced opportunity for fraud, lower costs, leveraged data with operational insight, and enhanced operational business efficiencies. DGS is rolling out eMMA's Procurement features over the course of several years. Its implementation streamlines the Procurement process and houses everything in one place.

At all state agencies and organizations, goods and services flow in, and payments for those goods and services flow out. At the head of this torrent, located "upstream," are the Vendors who supply those goods and services. In the middle is the OSP, tasked with developing goals and strategies to enhance the Procurement processes, including sourcing, supply chain management, and Vendor relationship management. Situated "downstream" is the General Accounting Division of the Office of the Comptroller, responsible for ensuring accurate and timely payments to Vendors as well as Vendor relationship management. Together with eMMA, both Procurement and Finance have the opportunity to create **significant value as well as cost savings** for the State of Maryland.

5   Who Uses eMMA?

Many Maryland state agencies, universities, and branches use eMMA for their Procurement needs. eMMA centralizes solicitations, projects, contracts, and data verification, which makes Procurement easier for both Vendors, POs and Vendor Coordinators.

If you're unsure if your agency participates, check with your supervisor, as certain state agency participation is required. Integration with other state agencies such as the Comptroller's office is coming and will allow us to keep documents, information, data, approvals, signatures, contracts, etc., all in one place.

6   What is iValua?

iValua is the modular procurement software we know as eMMA. Used by 250 organizations globally, it works with 6 interactive modules that are customized to best serve the needs, laws, and regulations regarding procurement in the State of Maryland. iValua's implementation will be phased in over the course of several years, which will result in a comprehensive PTP system.

7   Where to Get Access

If you do not have an eMMA login user ID and password, email the eMMA helpdesk at emma.helpdesk@maryland.gov. You will need to contact them using your state email address and provide them with your first name, last name, work phone number, job and/or role, and department/agency/organization.

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592902
This QRG shows you how to log in to eMMA once you have a user ID and password.

You must use the correct method to log in to eMMA. Your login method depends on your role and your agency. For more information, please visit our Quick Reference Guide (QRG) in the link above – How to Login to eMMA.

8   Getting Started in eMMA

This link below directs you to a webpage with helpful basic info on eMMA. Some QRGs listed there involve how to **log in**, **browse sourcing projects**, and **search for Vendors**.

https://mdprocurement.freshdesk.com/support/solutions/folders/70000471961

9 Common Solicitations Used in eMMA

Below are some of the more common solicitations used in eMMA. This is not an all-inclusive list for procurement professionals. Solicitations, such as Request for Resume, Request for Information, Reverse Auctions, and other procurement vehicles, are also available in eMMA.

Contact the OSP at central.procurement@maryland.gov for advice or support on using additional procurement types, or contact the eMMA Help Desk at emma.helpdesk@maryland.gov for technical support.

9.1.1 Public Notice

This is used only for publishing notification of solicitations and needs no vendor solicitation responses in the system. It is available for the university systems, local governments, and others to publish notifications of solicitations and direct vendors to their alternative systems or processes.

9.1.2 Small Category 1

Small procurement project type is for purchases less than $5,000 and focuses solely on a lowest price award decision. This project type is simple in that it only displays the necessary steps to publish a quick quote solicitation and award to the lowest bid.

9.1.3 Small Category 2

A Small Category 2 small procurement project type solicitation that is meant for purchases exceeding $5,000 up to $15,000. It doesn't need to be published in eMMA. POs, however, should obtain responsive bids or acceptable offers from at least two vendors by oral or written solicitation. Awards are made to the most favorable or evaluated bid price or most advantageous offer. This solicitation can be in person or by phone, fax, mail, bid board notice (eMMA), electronic (email/website) notice, advertising in a publication such as a newspaper or trade journal, etc. The same information should be provided to all prospective bidders or offerors. All Category 2 small procurement contracts must be in writing. While not required to be published in eMMA by regulation, it is a best practice!

9.1.4 Small Category 3

A Small Category 3 small procurement project type solicitation is for purchases over $15,000 but less than $50,000. This type of procurement must always be published in eMMA at least three days before bids or offers are due. POs should obtain responsive bids or acceptable offers from at least two vendors by written solicitation. Awards shall be made to the most favorable bid price or most favorable evaluated bid price or most advantageous offer. All Category 3 small procurement contract awards must be in writing.

9.1.5 Invitation for Bid (IFB)

A complex, large procurement project type solicitation is for purchases over $50,000 that require a price-only award decision once minimum qualifications are met. This project type is based on a CSB process, and it is only available to State POs. There must be a clear specification of goods or services. The awarded contract goes to the most favorable bid price or the most favorable evaluated bid price.

9.1.6 Request for Proposal (RFP) Double or Triple Envelope

A complex, large procurement project type solicitation is for purchases over $50,000, requiring both technical and financial award decision criteria. This project type is only available to State POs. It is based on a competitive sealed proposal process where the contract is awarded based upon the best value to the state, in consideration of both price and evaluation factors. Submitted proposals are evaluated by a committee who then advises the PO.

10 Procurement in eMMA

This section outlines the common processes for completing procurement in eMMA.

Your agency or organization may not use some of the tools or processes shown below.

PLEASE NOTE that eMMA is a secure but accessible source for all your procurement data, documentation, and materials, and it should be the single comprehensive file used for procurement.

10.1 Business Requests

Sourcing Projects can begin as a Business Request in the eMMA system. Program managers, POs, or other authorized staff (called "Business Owners" in eMMA) find that they have a need for a product or service. They can initiate that procurement as a Business Request, gain fund certification approvals, get input from subject matter experts, document categories and service areas, and then assign it to a Procurement Officer. The Procurement Officer takes the combined information and easily creates a sourcing project without duplicate work or input.

10.1.1 Create a Business Request (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592911

10.2 Create a Sourcing Project

Using a Business Request or simply creating it from scratch, a Sourcing Project is the core of any solicitation and serves as the official procurement file with all data, documents, team members, communications, etc. A sourcing project is the one place where everything for the procurement should exist and is backed up and filed officially in eMMA. The QRGs below show how to create a sourcing project and other more specific solicitation types in eMMA. Some of these QRGs also introduce required steps detailed in the next section, Prepare and Post a Solicitation.

10.2.1 Create a Sourcing Project (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592910

10.2.2 Create a Public Notice Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592909

10.2.3 Create a Small Category 1 Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592905

10.2.4 Create a Small Category 2 or 3 Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592906

10.2.5Create an IFB Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592903

10.2.6Create an RFP Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592904

10.3 Prepare and Post Solicitation

Once you've created a Sourcing Project and a solicitation for the procurement, you are ready to complete and prepare the project for advertisement/publishing. Published solicitations are always visible to the public unless they are deemed confidential. In this section, the below QRGs cover how to add required documentation, collaborators, and SMEs, how to input product and pricing requirements for goods and services, and add qualified Vendors to respond to your solicitation for publication.

10.3.1 Add Team Members to a Sourcing Project (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592912 (IF NEEDED)

10.3.2 Create a Schedule for a Sourcing Project (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592914 (IF NEEDED)

10.3.3 Scan and Add a Document to a Sourcing Project (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592913

10.3.4 Add Vendors to a Sourcing Project (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592916

10.3.5 Prepare Your Solicitation, Set Up Pricing, and Add Attachments (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592920

10.3.6 Notify Vendors and Publish Your Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592922

10.3.7 Create an Amendment or Cancel a Published Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592924

10.4 Analyze and Award Responses

During the advertising/publishing period, vendors can view and respond to your solicitation. Once this period closes, you can review the responses and award the best response based on factors from your agency or a committee. The following QRGs show you how to reveal responses, analyze, and award in eMMA.

10.4.1 Open Technical and Financial Envelopes (for 2-envelope RFP) (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592926

10.4.2 Unseal Bids and Analyze Vendor Responses (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592925

10.4.3 Award a Solicitation to a Vendor (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592927

10.5 Create a Contract

Once you award the solicitation to the best-qualified vendor(s), it's time to create the contract workspace for your solicitation. The Contract workspace contains the contract itself as well as all additionally required documentation such as tax clearance, certificate of good standing, and other information necessary for the contract file. Listed below are QRGs and steps to create a contract workspace in eMMA.

10.5.1 Create Contract from an Awarded Solicitation (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592928

10.5.2 Create Mods and Options and Cancel Contracts (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592931 (IF NEEDED)

10.5.3 How to Use DocuSign in eMMA (QRG)

https://mdprocurement.freshdesk.com/a/solutions/articles/70000592935 (IF PERMITTED BY YOUR ORGANIZATION)

10.6 Creating and Onboarding Vendors

10.6.1 Creating a Vendor Profile in eMMA

https://mdprocurement.freshdesk.com/a/solutions/articles/70000589283

Occasionally, you may need to create a Vendor in eMMA so they can bid on your solicitation. This QRG will walk through the process with you.

10.6.2 Onboarding Vendors

https://mdprocurement.freshdesk.com/a/solutions/articles/70000619706

If the awarded Vendor for your contract is not "Active" in eMMA, they will need to go through the onboarding process. This QRG shows how to start the onboarding process for your awarded Vendor.

11 Additional Procurement Resources

11.1 Additional QRGs

https://mdprocurement.freshdesk.com/support/solutions

In addition to the QRGs detailed in the previous section, the eMMA Knowledge Portal webpage contains additional QRGs and has all current ones published for both Buyer and Vendor QRGs. Please refer to these for additional information and support links.

11.2 Vendor Toolkit

Coming soon…

11.3 On-Demand Training

These resources listed below are video-based training, including recordings of live webinars, available any time on these websites. Transcripts of the recordings are also available on these sites.

11.3.1 eMMA Training Channel

https://gotostage.com/channel/emma

This GoToStage video channel contains On-Demand training webinars available at any time as well as a calendar of upcoming live training with registration links. The webinars can easily be viewed. The webinar allows POs to jump quickly to sections of interest, as well as view and print training transcript. Certified eMMA trainers, who are also POs. demonstrate how to complete the covered processes live in eMMA. Tips and additional best practice guidance are covered as well.

11.3.2 eMMA Vendor Training

https://gotostage.com/channel/emmavendortraining

This GoToStage video channel houses useful training videos for eMMA Vendors. POs and other procurement-related staff may find understanding the vendor processes and viewpoints helpful in conducting their own procurements or procurement related work.

12 Terminology

Acronyms and definitions used in this document are listed below.

Table 3 - Terminology	
Acronym	**Definition**
CSB	Competitive Sealed Bid
DGS	Department of General Services
eMMA	eMaryland Marketplace Advantage
IFB	Invitation for Bid
MBE	Minority Business Enterprise
MDPA	Maryland Procurement Academy
NASPO	National Association of State Procurement Officials
OSP	Office of State Procurement
QRG	Quick Reference Guide
PO	Procurement Officer
PTP	Procure-to-Pay
RFP	Request for Proposals
SME	Subject Matter Expert
Ts&Cs	Terms and Conditions
VSBE	Veteran-Owned Small Business Enterprise

13 Contact Information

To contact the Maryland Procurement Academy, email dgs.osp-mdpa@maryland.gov

To contact the eMMA Help Desk, email emma.helpdesk@maryland.gov