



King County

Goods & Services Procurement Guide

Procurement & Payables

Department of Executive Services

Goods and Services Procurement Guide

Table of Contents

Section 1 - Overview	3
A. Central Procurement Authority.....	3
B. What are Goods and Services?.....	4
C. King County Policies Applicable to Goods and Services Contracts	4
Section 2 - Purchasing Rules	5
A. Direct Buys (Purchases under \$10,000).....	5
B. Request for Quotations (Purchases between \$10,000 - \$50,000)	6
C. Formal Solicitations (Purchases over \$50,000).....	7
D. Exempt Purchases.....	13
E. Waivers	14
F. Emergency Waivers.....	15
G. Federal Procurement Requirements	15
Section 3 - How to Buy Goods and Services	18
A. Service Requests.....	18
B. Requisitions	20
C. NIGP code lookup.....	21
D. E-Procurement System Access & Roles.....	21

Goods and Services Procurement Guide

Section 1 - Overview

The purpose of this guide is to provide step by step instructions to Implementing Agencies on the procurement process for goods and services contracts. It includes best practices, standard practices, dollar value thresholds, and links to the required templates to complete goods & services procurements. This does not apply to the procurement of Professional Services, Architectural & Engineering Services, or Construction.

The guide is organized by procurement phase and describes the various procurement process that could apply. Each phase includes an overview followed by step by step instructions and links to the required resources. The Appendix includes templates, guidelines, website links, and definitions.

A. Central Procurement Authority

[Chapter 2.93 \(Procurement\)](#) of the King County Code establishes Procurement & Payables (P&P) as the County's central procurement authority to:

- 1) ensure open, fair, and competitive procurement processes;
- 2) establish a procurement system of quality and integrity;
- 3) maximize the purchasing value of public funds; and
- 4) administer the County's procurements to maximize economies of scale, consistency in County practices, and accountability procedures.

P&P's procurement authority applies to the procurement of tangible personal property, services, professional services, and public work. Except where exempt by state law, county ordinance or executive policy, County procurement shall be administered through the Procurement and Payables section.

[Chapter 2.93.020 \(Authorization\)](#) authorizes the Chief Procurement Officer to take all actions necessary and appropriate to implement the policies and provisions in Chapter 2.93, and to promulgate such rules, regulations, and guidelines as the Chief Procurement Officer deems necessary to carry out the purposes or provisions of Chapter 2.93.

In order to carry out the duties enumerated above, P&P established standard templates, guidelines, and boilerplate to efficiently and consistently administer the procurement processes. Implementing Agencies are required to use the resources provided by P&P and adhere to P&P's standard processes. Internally, P&P developed standard work to guide Contract Specialists in order to provide consistent and efficient customer service to Implementing Agencies and establish a baseline of performance standards.

Goods and Services Procurement Guide

B. What are Goods and Services?

King County Code defines goods as any tangible personal property including equipment, supplies, materials and goods, and includes intangible personal property that is movable, subject to ownership, and has exchange value.

Services mean, with the exception of Professional Services, the furnishing of labor, time, or effort by a supplier, not involving the delivery of goods, such as reports that are merely incidental to the required performance.

C. King County Policies Applicable to Goods and Services Contracts

- 1) [CON 7-27 \(General Procurement\)](#) establishes uniform guidance, encourages competition through open and transparent procurement, and ensures consistency, efficiency, and transparency of conducting business with third-party vendors.
- 2) [CON 7-24 \(Goods & Services\)](#) establishes the policies for the procurement and administration of goods and services contracts for the direct benefit of and consumption by King County.
- 3) [CON 7-22 \(Sustainable Purchasing Executive Policy\)](#) provides guidelines for the Sustainable Purchasing Ordinance (KCC 18.20). Pulling together sustainable purchasing requirements and strategies related to procurement from various King County policies, it offers guidance on specific commodities as well as general directions for making more sustainable choices when purchasing.

Section 2 - Purchasing Rules

A. Direct Buys (Purchases under \$10,000)

Within a calendar year, each cost center/org may buy less than \$10,000 (including freight but excluding tax) of similar goods & services without a contract or comparing quotes. The federal spending micro purchase threshold of \$10,000 matches King County's direct buy threshold per the National Defense Authorization Act of 2018 and 2 CFR 200.67.

Follow the 6 Steps to Success to ensure your purchases meet King County's goals.

1) Assess the Need:

- Can you avoid the purchase?
- Can you repurpose what you have?
- Can you get it secondhand from Surplus?

See what's available at the Surplus warehouse (707 S. Orcas St) or add items to your wish list; they'll notify you if it comes in. Email kcsurplus@kingcounty.gov.

2) Search Existing Contracts:

If you must purchase check for [Awarded Contracts](#) (even if it costs less than \$10,000). We've already negotiated a great deal!

3) Think Sustainable:

Use [Sustainable Purchasing Guide](#) to find green alternatives and federally approved eco-labels. Look for:

- made with recycled content
- recyclable/compostable
- reusable or durable
- low: toxicity, VOCs, energy, or water
- biobased

4) Shop Small Business:

For purchases under \$10,000, you may use your discretion to support small businesses even if they're not the lowest price. Search King County's [Small Contractors & Suppliers](#) (SCS) directory.

5) Pay with P-Card:

P-Card is a convenient and cost-effective payment option. Paying with P-Card reduces paper waste and saves time...\$74 per transaction! [Get a P-Card](#).

6) Use Proper Disposal:

Goods and Services Procurement Guide

- Reuse items, or surplus
- Compost and recycle
- Recycle with supplier
- Dispose of hazardous waste correctly

Use the handy lookup tool "[What Do I Do With...?](#)" to determine proper disposal for common items.

If you're unsure about any of these steps, contact your Procurement staff by Logging in to King County's E-Procurement Portal and Create Service Request: Request For Advice (RFA).

B. Request for Quotations (Purchases between \$10,000 - \$50,000)

King County must request quotations from at least 3 registered suppliers, including one SCS-certified small business (if available) for all purchases between \$10,000 - \$50,000. Purchase limits apply to the total amount of "like" goods and services you intend to buy within a calendar year, per cost center.

If you need a Request for Quotations first, check the [Awarded Contracts list](#). If there's already a contract, use it! If there's no contract available, follow these steps:

- 1) [Login to King County E-Procurement](#) and Create Service Request: [Request For Advice \(RFA\)](#). Procurement staff will evaluate your purchasing needs and recommend a procurement method.
- 2) You will be assigned a follow-up service request to gather additional information about your purchasing needs, including specific criteria that will be used to determine suppliers' responsiveness (including any [sustainable requirements](#) such as eco labels or prohibited substances). Once you've completed your assigned service request, your Procurement staff will gather quotes from registered suppliers.

Depending on the nature of the goods or services, your Procurement staff will either award a contract to the lowest bidder that meets your needs (after your concurrence with the award recommendation) or send you evaluation instructions to score the submitted proposals; after you've selected a supplier, your Procurement staff will execute the contract.

- 3) To make your purchase, you may either requisition a Purchase Order in Oracle EBS or pay with your [P-Card](#).
 - If paying with P-Card, reference the Contract Purchase Agreement (CPA) or solicitation number in the "Justification" field in the event of a one-time buy.
 - If requisitioning a purchase order, reference the CPA number in the "Agreement" field or the solicitation number in the "Note to Buyer" section.

Goods and Services Procurement Guide

C. Formal Solicitations (Purchases over \$50,000)

King County must conduct solicitations for all purchases in excess of \$50,000 and are advertised on P&P's public facing website and published in newspaper(s). There are multiple solicitations types that P&P may recommend. These solicitations are broken into the following phases:

1) Pre-Planning



If you have a purchasing need or have a procurement question, you must submit a Request for Advice (RFA).

You will be assigned a follow-up New Goods & Services Solicitation service request to gather additional information. Based on your procurement needs, your Procurement staff may recommend any of the following:

- **Invitation to Bid**

An Invitation To Bid (ITB) seeks suppliers who can supply a specific goods or services at the lowest price. ITBs...

- Only consider price as the determining factor between responsible, responsive bidders
- Do not allow negotiations
- Take approximately 3 months to complete

- **Request for Proposals**

Requests for Proposals (RFP) seek proposals from suppliers about how best to achieve the agency's objectives. Proposals are evaluated on criteria other than just price. RFPs...

- Are a good option if you don't know what's available, or what approach is best
- Allow you to evaluate meaningful criteria other than price
- Include evaluations and negotiations
- Take approximately 6 months to complete
- Are evaluated by an evaluation committee made up of technical and functional specialists

- **Request for Qualifications**

Requests for Qualifications (RFQ) seek to qualify a roster of suppliers to do additional competitive procurements later. RFQs...

- Are used to pre-qualify suppliers depending on their specialty

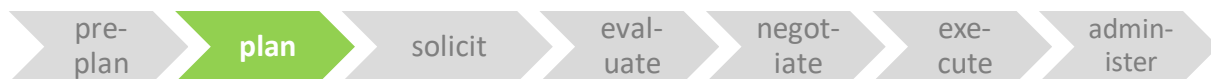
Goods and Services Procurement Guide

- Establish a master contract with each pre-qualified supplier including negotiated terms and conditions but no formal scope of work
- Are followed by work order procurements solicited to the pool of qualified suppliers. (You can use the pool for multiple procurements to establish multiple contracts with defined scopes or specifications.)
 - Solicit work orders to the entire pool or a subset of the qualified supplier pool based on the competition requirements determined by the work order spend (under \$10,000: solicit one supplier; \$10,000-\$50,000: solicit at least 3 pool suppliers; \$50,000+: solicit from the entire pool of pre-qualified suppliers in the applicable category)
 - Evaluate work orders based on project needs: cost and/or experience
- Take approximately 3 months to complete
- **Request for Information**

Requests for Information (RFI) are used to research a process, product, or the viability of a proposed solution by asking the supplier community to provide information on the topic. RFIs...

 - Are less formal
 - Are not technically a procurement
 - Don't have a specified format for responses
 - Will not lead to a purchase
 - May lead to an ITB, RFP, or RFQ solicitation later
 - Take approximately 3 months to complete

2) Planning



Once you've completed the New Goods & Services Solicitation service request your Procurement staff assigned, we can begin planning your solicitation.

- Complete all fields in the assigned service request:
 - Funding Sources

Prior to initiating a procurement request, the requesting IA shall ensure that adequate funds have been appropriated
 - Bidding Requirements

Goods and Services Procurement Guide

- Insurance Requirements Form
The Insurance Requirements Form is integrated with the service request. Once you complete the Solicitation Service Request, Risk Management will be notified to complete their review.
- Attach the required documents to your Solicitation service request:
 - Draft RFP Scope of Work (SOW)/ITB Specifications ([Specs Tip Sheet](#))
 - Incorporate ecolabels & sustainability standards ([Sustainable Purchasing Guide](#))
 - Attachments and Exhibits
 - Attachments: documents or forms bidders/proposers must submit
 - Exhibits: additional information for bidders/proposers
 - (ITB Only) Pricing Sheet - list the bid items you expect bidders to price, including the unit of measure
 - (RFP/Q Only) Proposal Evaluation Planning
 - Evaluation committee: identify who will review proposals (functional, technical, and end user perspectives, etc.)
 - Proposal questions: describe what we want from the proposer (narrative response, Q&A chart, etc.)
 - Evaluation criteria: define the qualifications used to score proposals; assign points to what's most important
- Subcontracting/Apprenticeship Opportunities Analysis
Your information will automatically be routed to the Business Development & Contract Compliance office for review and assignment of small business utilization and apprenticeship goals.
- Finalize the solicitation and draft agreement documents
Your Procurement staff will send you a message in King County E-Procurement system when the documents have been uploaded to SharePoint and are ready for your collaboration and finalization.

3) Solicitation



- Solicitation advertised in newspapers and online
Solicitations details will be posted to the Seattle Times as a legal ad by P&P and on the [Solicitation Abstract](#) page that will direct suppliers to E-Procurement.

Goods and Services Procurement Guide

- Pre-Bid/Proposal Meeting

At the pre-bid/proposal meeting, Procurement staff will facilitate and will require your agency to present a summary of the contract scope or specifications describing your needs. This is an informational meeting. All questions from bidders or proposers about the contract must be submitted in writing prior in preparation for this meeting.

- Addenda and Clarifications

Supplier questions will be submitted to your Procurement staff. You'll be asked to assist P&P in preparing formal responses. Forward all questions related to the procurement to the Procurement staff. Do not respond back directly to the supplier. P&P will issue clarifications which are for information purposes only, which do not affect any changes to the solicitation. Any material changes to the specification will be published through King County E-Procurement as addenda.

4) Evaluation



- Bid Opening

P&P opens bids when they are due, but agencies are not required to attend.

- Invitation to Bid (ITB): The Procurement staff will review the bids and prepare a tabulation ("bid tab") which compares the companies' prices. King County awards to the lowest responsive, responsible bidder(s). Your agency must review and approve the Procurement staff's recommendation for award.
- Request for Proposal (RFP): The agency evaluation team will access the consultant proposal documents from within King County E-Procurement. Procurement staff will coordinate with the evaluation team will review proposals and conduct consensus scoring offline. Any proposal clarification and scheduling of interviews, demonstrations or presentations will be handled by Procurement staff.

- Debarment

Before execution of a contract, P&P must verify that the party is not suspended, debarred, or disqualified on County, State, and Federal suspension and debarment lists, as applicable.

- Notice of Intent to Award/Notice of Selection

Your Procurement staff will use the King County E-Procurement app to message the successful bidder/proposer and all other participating

Goods and Services Procurement Guide

vendors with the Notice of Intent to Award/Notice of Selection. The suppliers will receive an email notification. By logging into their profile, the supplier can upload requested documents, which may include insurance forms, etc. prior to contract award.

- Protests

Suppliers have two business days to formally protest after the Notice of Intent to Award/Notice of Selection is issued. P&P will receive the protest submittal and follow the protest procedures documented in the ITB/RFP. P&P will communicate with your agency and suppliers throughout the process.

- Debriefs

A debrief is an optional meeting any supplier may request to discuss their proposal and how it was scored. King County will NOT disclose any other proposals. Debriefs are intended to promote transparency by giving suppliers a chance to be heard and ask questions about how their proposal was evaluated, so that they might be more competitive next time.

5) Negotiation



- Invitations to Bid (ITBs)

Negotiation is not permitted. The bid submittal constitutes acceptance of terms & conditions.

- Requests for Proposals/Qualifications (RFP/Q)

Negotiations may begin with the supplier as soon as P&P issues the Notice of Selection

During negotiations the following should occur:

- Finalize the Scope or Work (referred to as the Statement of Work in the final agreement).
- Address supplier concerns with our Terms and Conditions:
 - Consult the PAO before accepting changes to avoid putting King County at risk
 - Consult with Risk if the proposer requests changes to the insurance requirements
 - Consult with [BDCC](#) if there are concerns about the small business utilization requirements
- Determine the final contract pricing with the supplier.

6) Contract Execution

Goods and Services Procurement Guide



Your agency contract signatories will receive an email with a link to sign the contract electronically using DocuSign. A final signed copy of the agreement can be downloaded from the DocuSign confirmation email. The Implementing Agency's Department Director signs the contract after determining compliance with all applicable contracting requirements and maintains executed contract according to department procedures. Exception: Federal agencies must provide a letter of concurrence, as required by federal regulations.

7) Contract Administration



- **Supplier Relationships**

The agency should maintain and nurture a relationship with the supplier. If there are issues with the supplier's fulfillment of the contract terms (delivery, quality, etc.), the agency shall document the situation and work with the supplier to resolve it. It may be a simple misunderstanding or a lack of clarity in the contract terms. Contact the Procurement staff if you are unable to find resolution by working with the supplier.

Documentation should include...

- Description of the situation
- Frequency
- Significance/impact
- Efforts at reconciliation from both parties
- Email communications

- **Contract Change Orders/Amendments**

Amendments are formal changes requiring approval to an existing contract. Amendments are usually added to a contract due to a significant change in either the scope of work, time of performance, or quality of the service being obtained.

Change orders are written documentation reflecting changes made to order amounts, delivery locations, revised stipulations or conditions, or other terms of the contract during its execution. For purchase orders, a change order may be issued directly by the county without requiring the signature of the vendor. In both cases, a contract amendment or change order is a written change to the terms of the contract.

Goods and Services Procurement Guide

King County contracts include a change provision that permits the county to make changes to the work. Change orders and amendments must be executed by a county designee with financial authority to bind the county to an expenditure of funds. This must be accomplished prior to commencement of the new work.

Any price revisions requested by a Contractor shall be reviewed by P&P to determine if it is justified with the Agency consulted on the nature of the request.

If the contract is state or federally funded, the Agency shall obtain approval from the funding agency in the following circumstances: whenever a change would result in the need for additional funding and/or in accordance with the agency and grant requirements.

Submit a Contract Change Order/Amendment Service Request:

- If you've already executed the amendment, attach the signed document to the service request.
 - Or, you may ask P&P to route the amendment for signature through DocuSign.
- **Contract Close-Out**
Once the final invoice has been paid, submit the "Close Contract Agreement" Service Request.
 - **Do you need a new contract?**
The agency should be aware of the contract expiration date and whether or not a new contract will be needed.
Submit a Request for Advice Service Request in advance of contract expiration so there is not a gap in service between contracts.
 - For ITBs - at least 90-100 days prior to expiration
 - For RFPs - at least 6-9 months prior to expiration

D. Exempt Purchases

Certain types of purchases are considered exempt from the competitive procurement requirements and can be contracted. The "Create Contract Agreement" service request is used when requesting a CPA for exempt purchases. All other goods and services contract needs should begin with a Request For Advice (RFA) service request.

Below are examples of purchases exempt from the competitive procurement process:

- Utilities
- Postage
- Membership fee

Goods and Services Procurement Guide

- Tuition
- Tolls

E. Waivers

Waivers allow you, if justified, to bypass the standard procurement process for full and open competition for purchases more than \$10,000. King County promotes full and open competition. Only use waivers when necessary.

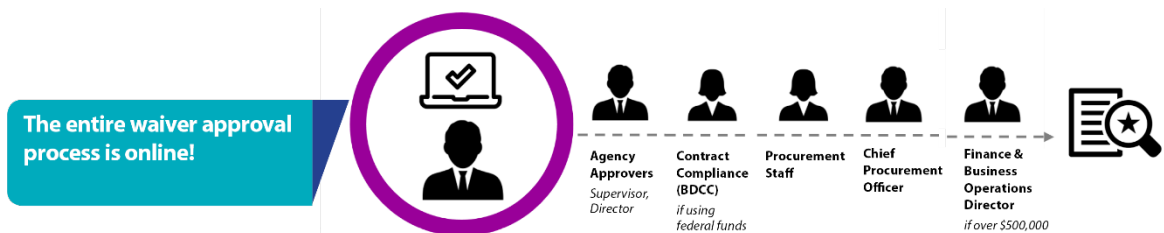
How To Request a Waiver:

1. Submit a service request for a Waiver.

You'll need to indicate the funding source (local or federal), the waiver type, and the justification for using a waiver instead of completing the normal procurement process. If using federal funds, read the federal guidelines carefully to ensure compliance (2 CFR 200.320).

If you're not sure if your purchase qualifies for a waiver, you may submit a Request for Advice (RFA) and our Procurement staff will recommend the appropriate procurement method for your needs. Exempt purchases do not require a waiver. For example: utilities, postage, subscriptions, memberships, conferences/trainings, etc.

2. Your supervisor and department director must approve the waiver before the service request is automatically routed to Procurement & Payables. Depending on the funding source and dollar amount, your waiver may require many levels of approval before your request can be completed. You can track the status of your service request in [King County E-Procurement Portal](#).



Local Funding	Federal Funding
<ul style="list-style-type: none"> • Single source A Single Source procurement is one in which two or more vendors can supply the commodity, technology and/or perform the services required by an agency, but a single supplier is selected over the others for reasons such as unique expertise, standardization or previous experience with similar contract • Sole source A sole source purchase means that 	<ul style="list-style-type: none"> • Single Source The item is available only from a single source. • Federally Pre-Approved Non-Competitive The Federal awarding agency (or pass-through entity) expressly authorizes noncompetitive proposals in response to a written request from King County. • Inadequate Competition After solicitation of a number of

Goods and Services Procurement Guide

Local Funding	Federal Funding
<p>only one supplier (source), to the best of the requester's knowledge and belief, based upon thorough research, (i.e. conducting a market survey), is capable of delivering the required product or service.</p> <ul style="list-style-type: none"> • Special facilities A supplier has a unique site or facility • Special market conditions Unique circumstances resulting in cost savings 	<p>sources, competition is determined inadequate.</p>

F. Emergency Waivers

In the event of an emergency, as defined in RCW 39.04.280, the Executive may issue a declaration of emergency. As part of the declaration or proclamation the Executive may issue a waiver of the public advertising and competitive procurement requirements for goods and services. The procurement waiver remains in effect until that proclamation expires.

Use awarded contracts when possible. The contracts marked with a red flag are eligible for Federal FEMA reimbursement. In an emergency, your agency may use any of the universal contracts listed here. For a full list of contracts, visit the [Awarded Contracts](#) page.

G. Federal Procurement Requirements

When an agency has a procurement need that is funded in any part with federal funds, the agency must identify the source of the funding to Procurement & Payables (P&P) when submitting the initial Service Request. This information is imperative to ensure that the procurement is conducted per the federal rules as outlined in CON 7-8-2-EP as well as the funding source requirement documents.

For more detailed questions please work with your P&P Buyer or Contract Specialist to ensure the procurement follows all federal requirements set forth in 2 CFR 200 Sections 318-326.

1. King County P&P Buyers have standard work that require evaluators on all Requests for Proposals to sign a conflict of interest determination before reviewing proposals. If the King County employee fails to sign the conflict of interest and non-disclosure documents they are removed from the evaluation panel. 2 CFR 200.318 (c) (1)
2. P&P will maintain records sufficient to detail the history of the procurement. These records will include, but is not limited to, the following; rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price. 2 CFR 200.318 (i)

Goods and Services Procurement Guide

3. King County may use a time and materials type contract only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. Therefore, each contract must set a ceiling price that the contractor exceeds at its own risk. King County must assert a high degree of oversight in order to obtain reasonable assurance that the contractor is using efficient methods and effective cost controls. 2 CFR 200.318 (j) (1)(2)
4. All procurement transactions shall be conducted in a manner providing full and open competition. In order to ensure objective contractor performance and eliminate unfair competition advantage, contractors that develop or draft specifications, requirements, statements of work, or invitation for bids or requests for proposals must be excluded from competing for such procurements. 2 CFR 200.319 (a)
5. King County shall not restrict competition by placing unreasonable requirements on firms in order for them to qualify to do business, requiring unnecessary experience and excessive bonding, allow noncompetitive pricing practices between firms or between affiliated companies, award noncompetitive contracts to consultants that are on retainer contracts, not preventing organizational conflicts of interest, specifying only a “brand name” product instead of allowing “an equal” product to be offered and describing the performance or other relevant requirements of the procurement, or taking any arbitrary action in the procurement process. 2 CFR 200.319 (a) (1-7)
6. King County shall conduct procurements in a manner that prohibits the use of statutorily or administratively imposed state, local, or tribal geographical preferences in the evaluation of bids or proposals, except in those cases where applicable federal statutes expressly mandate or encourage geographic preference. 2 CFR 200.319 (b)
7. King County may use sealed bids (formal advertising). Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. 2 CFR 200.320 (c)
8. If sealed bids are used the following requirements apply; bids must be solicited from an adequate number of known suppliers, providing them sufficient response time prior to the date set for opening bids and the bids must be opened publicly. The invitation for bids, which will include any technical specifications, plans, and pertinent attachments, must define the items or services in order for the bidder to properly respond. All bids will be opened at the time and place prescribed in the bid documents. A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Any or all bids may be rejected if there is sound documented reason. 2 CFR 200.320 (c) (2)
9. King County may conduct competitive proposals as a procurement type when conditions are not appropriate for the use of sealed bids. When this method is used, the following requirements apply: Requests for proposals are publicized

Goods and Services Procurement Guide

and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals shall be considered to the maximum extent practical. Proposals are solicited from an adequate number of qualified sources. King County has a written method for conducting technical evaluations of the proposals received and for selecting recipients. Contracts shall be awarded to the responsible firm whose proposal is most advantageous to King County, with price and other factors considered. 2 CFR 200.320 (d)

10. King County will perform a cost or price analysis in connection with every procurement action in excess of the Simplified Acquisition Threshold (\$250,000) including contract modifications. 2 CFR 200.323 (a)
11. King County will negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. CFR 200.323 (b)
12. Costs or prices based on estimated costs for contracts under a federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for King County. 2 CFR 200.323 (c)

Section 3 - How to Buy Goods and Services

Purchasing rules apply to the total cost of like goods & services you intend to buy within a calendar year (January - December), per cost center. "Like" goods & services are anything a reasonable person would describe as similar. "Intent" is how much you think you need, based on estimates such as your budget or past experience.

A. Service Requests

The King County E-Procurement Portal Service Request system allows you to request procurement services and track the status of your requests. Only King County employees with an E-Procurement license and an assigned "SR Agency Requester" role can submit service requests. Read more about system access & roles

Please note: the E-Procurement Portal works best in Chrome or Firefox browsers. Do NOT use Internet Explorer (IE).

1. Request for Advice

Every procurement over \$10,000 must start with a Request For Advice (RFA), even if you plan to pay with your P-Card. Our expert staff will review your RFA and recommend the solicitation type that best suits your needs: Request For Quotation, ITB, RFP, etc.

Submit an RFA Service Request through the King County E-Procurement Portal. Your assigned Procurement staff will send you a follow-up service request to collect additional information and required documentation to complete your solicitation.

2. Create Contract Agreement

The "Create Contract Agreement" service request is ONLY used when requesting a CPA for:

- Intergovernmental Agreements
- Non-Profit / Grant / Public Service
- Exempt Purchases
- Revenue Vehicle

All other contract needs should begin with a Request For Advice (RFA) service request.

CPAs are noted in the system as Contract Purchase Agreements. To make changes to an existing Contract Purchase Agreement, please enter a request for a Change Order/Amendment.

3. Contract Change Order / Amendment

Amendments are formal changes requiring approval to an existing contract. Amendments are usually added to a contract due to a significant change in

Goods and Services Procurement Guide

either the scope of work, time of performance, or quality of the service being obtained.

Change orders are written documentation reflecting changes made to order amounts, delivery locations, revised stipulations or conditions, or other terms of the contract during its execution. For purchase orders, a change order may be issued directly by the county without requiring the signature of the vendor. In both cases, a contract amendment or change order is a written change to the terms of the contract.

King County contracts include a change provision that permits the county to make changes to the work. Change orders and amendments must be executed by a county designee with financial authority to bind the county to an expenditure of funds. This must be accomplished prior to commencement of the new work.

If the contract is state or federally funded, the county shall obtain approval from the funding agency in the following circumstances: whenever a change would result in the need for additional funding and/or in accordance with the agency and grant requirements.

Goods and Services change orders are usually less complex and typically executed by our Procurement staff.

- Do you already have a signed change order or amendment? Attach the signed document to your service request.
- If you still need to sign (or want to sign electronically with DocuSign). Please specify this in your service request.

When amending the contract and adding new suppliers, P&P and IAs will verify the parties are not suspended, debarred, or disqualified.

4. Close Contract Agreement

A request for closing a CPA is submitted when all work has been completed, accepted and final payment has been made. For construction contracts this would include release of retainage. Your department should follow your established close out procedures.

5. Supplier Master Record

Before any Purchasing can begin, Supplier Master records need to be set up in Oracle EBS. Submit a Service Request through the King County E-Procurement Portal.

If you are submitting a request for a new supplier master record for one of the following reasons, STOP and contact Procurement staff.

- Multiple payments under \$50,000
- One-time or multiple payments over \$50,000

Oracle Supplier Master Records are set up and updated from requests received from the King County E-Procurement Portal Service Request

Goods and Services Procurement Guide

module. It is important that Oracle Supplier records be accurate and kept up to date to prevent a delay in the Procure to Pay process.

The following links will take you to forms:

- [How to Search for a Supplier in Oracle EBS](#)
- [King County Substitute W9](#)
 - [Instructions for Businesses](#)
 - [Instructions for Individuals](#)
- [Automated Clearing House \(ACH\) Authorization Agreement](#)

Please allow 2 business days for your service requests to be processed. Be aware: if you are notified to supply additional information please respond within 5 business days. If no response or action is taken within 5 business days your service request will be cancelled.

6. Item Master Record

The Oracle Item Master is a collection of records that define specific items in the system, for both purchasing and inventory activities. An Item Master Record is required to define an inventory item. Submit a Service Request through King County E-Procurement Portal.

Procurement & Payables (P&P) is responsible for the input of new Item Master Records into the Oracle Item Master. The details on this request form are the "Master-Level" data points needed to set up a new item. Once a request is submitted, P&P will validate the information in the request.

If the request is for an inventory item, the new record will be assigned to the Oracle Inventory Organization specified in the request. This setup is required to allow the requesting agency to create inventory replenishment requisitions for the item. Please allow 1 business day for your service requests to be processed.

7. Update Item Master Record

If you identify an item defined in the Oracle Item Master that your agency needs to start inventorying, use the "Update Item Master Record" sub-type to request that the item be assigned to your Oracle Inventory Organization.

Add description of change requested to comments section.

B. Requisitions

King County Oracle E-Business Suite allows IA's to submit requisitions to P&P. IA responsibilities:

1. Closing purchase orders that are partially received but on which no further activity is anticipated.

Goods and Services Procurement Guide

2. Entering all receipts in a timely manner and monitoring open purchase orders monthly to assure that purchase orders are closed after goods and/or services are received and the supplier payment has been made.

C. NIGP code lookup

For inventory items, you'll need to provide the NIGP category code with your Item Master service request. Use the search function in [the table](#) to find the appropriate code.

D. E-Procurement System Access & Roles

1. Agency Requester for Service Requests

Users assigned this role can create, update, and view service requests (including access to update/add team collaboration members and in-app messaging) in the King County E-Procurement Portal Service Request module.

NOTE: You must have an E-Procurement license to submit Service Requests. Due to the expense and limited number of licenses available countywide, please contact procurement.web@kingcounty.gov to ask about an E-Procurement license and "Agency Requester" access.

2. Agency Sourcing Project Collaborator for Solicitations

Users assigned this role can review solicitations, collaborate with in-app messaging, and view supplier solicitation responses in the King County E-Procurement Portal Solicitations module. All Evaluation Panelists should be assigned this role.

Any King County employee may be assigned this role. To request access, email: procurement.web@kingcounty.gov