

# Orientation for Procurement Handbook



Rev. March 2015



# Welcome to the Procurement Handbook course!

This course will provide you with the information on the Procurement Handbook on how to access, understand, search and locate numerous Parts and Chapters.

Select the NEXT  button to continue

# Course Navigation

This course is presented on a series of slides. Navigate through the slides by selecting the NEXT or PREVIOUS button.



**PREVIOUS**



**NEXT**

You may exit the course at any time. When you return to the course, you can choose to resume the course or start from the beginning.

Select the NEXT button now to start the course.

# Introduction

Upon completion of this course, you should be able to:

- Describe what the Procurement Handbook is and what information it provides
- Access the Online Procurement Handbook via the DGS website and understand screen navigation
- Understand the four parts of the Procurement Handbook
- Locate and preview the numerous Chapters under each Part of the Procurement Handbook



# Procurement Handbook Overview



# Procurement Handbook Overview

## Commonwealth Procurement Law

### Act 57 of 1998

- ❖ Signed into law in May of 1998 by former Governor Tom Ridge
- ❖ Act 57 contains the “Commonwealth Procurement Code”, Title 62 of the Pennsylvania Consolidated Statutes
  - The Procurement Handbook is a standard reference guide for the Commonwealth Procurement Code



# Procurement Handbook Overview

## Commonwealth Procurement Law

### Procurement Handbook

- ❖ The Procurement Handbook provides information on the policies, procedures, and guidelines for the procurement of materials, services, and construction under the authority of Act 57 of 1998
- ❖ The Handbook is “Online” in PDF format and no longer exists in hard copy
  - The Handbook is published quarterly (Feb., May, Aug., Nov.)



# Procurement Handbook Overview

## Commonwealth Procurement Law

### Procurement Handbook (cont'd)

- ❖ All Commonwealth Purchasing Professionals should be familiar with the structure and organization of the Procurement Handbook
- ❖ The Handbook is divided into four Parts, with numerous Chapters under each Part
  - The Chapters contain references to various forms, management directives, laws, etc., many with hyperlinks to the corresponding documents.



# Navigating the Procurement Handbook



# Navigating the Procurement Handbook

## How to access the Procurement Handbook

The Procurement Handbook is web-enabled for COPA end-users and is located on the Department of General Services website, under **“Doing Business with the Commonwealth, Procurement”**.

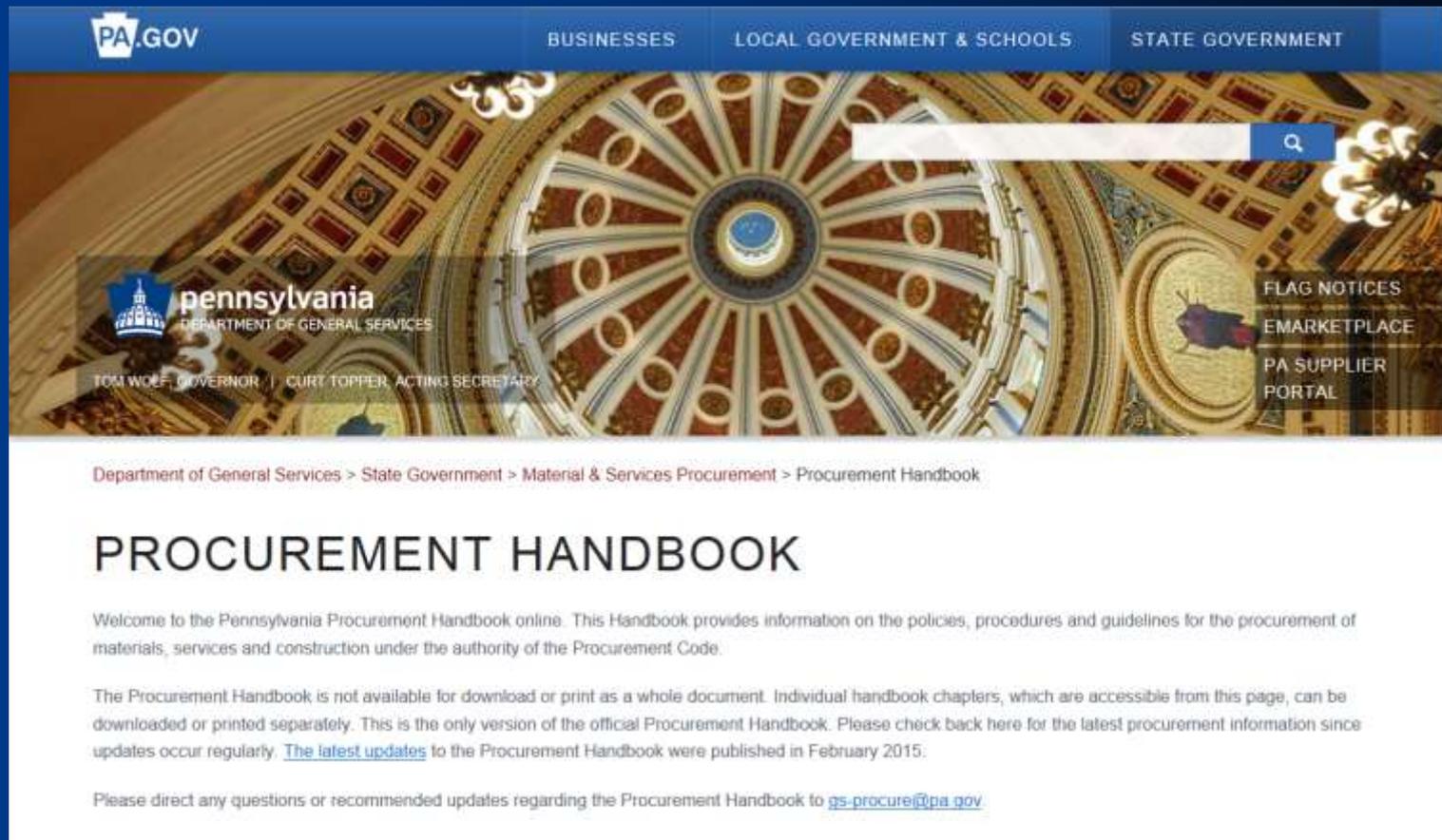
- URL: [www.dgs.pa.gov](http://www.dgs.pa.gov)

The Procurement Handbook is public information and is available for all to view.



# Navigating the Procurement Handbook

## Online Procurement Handbook Welcome Page



The screenshot shows the top navigation bar of the PA.GOV website with links for BUSINESSES, LOCAL GOVERNMENT & SCHOOLS, and STATE GOVERNMENT. Below the navigation is a search bar and a banner for the Pennsylvania Department of General Services, featuring the state seal and names of Governor Tom Wolf and Acting Secretary Curt Topper. On the right side of the banner are links for FLAG NOTICES, EMARKETPLACE, and PA SUPPLIER PORTAL. The main content area includes a breadcrumb trail: Department of General Services > State Government > Material & Services Procurement > Procurement Handbook. The title 'PROCUREMENT HANDBOOK' is prominently displayed. The introductory text welcomes users and provides information on the handbook's scope and availability. It notes that the handbook is not available for download or print as a whole document, but individual chapters can be accessed. It also mentions that the latest updates were published in February 2015. A contact email, [gs-procure@pa.gov](mailto:gs-procure@pa.gov), is provided for questions or updates.

PA.GOV BUSINESSSES LOCAL GOVERNMENT & SCHOOLS STATE GOVERNMENT

search

 **pennsylvania**  
DEPARTMENT OF GENERAL SERVICES

TOM WOLF, GOVERNOR | CURT TOPPER, ACTING SECRETARY

FLAG NOTICES  
EMARKETPLACE  
PA SUPPLIER PORTAL

Department of General Services > State Government > Material & Services Procurement > Procurement Handbook

## PROCUREMENT HANDBOOK

Welcome to the Pennsylvania Procurement Handbook online. This Handbook provides information on the policies, procedures and guidelines for the procurement of materials, services and construction under the authority of the Procurement Code.

The Procurement Handbook is not available for download or print as a whole document. Individual handbook chapters, which are accessible from this page, can be downloaded or printed separately. This is the only version of the official Procurement Handbook. Please check back here for the latest procurement information since updates occur regularly. [The latest updates](#) to the Procurement Handbook were published in February 2015.

Please direct any questions or recommended updates regarding the Procurement Handbook to [gs-procure@pa.gov](mailto:gs-procure@pa.gov)



# Navigating the Procurement Handbook

## Online Procurement Handbook Welcome Page

### PROCUREMENT HANDBOOK

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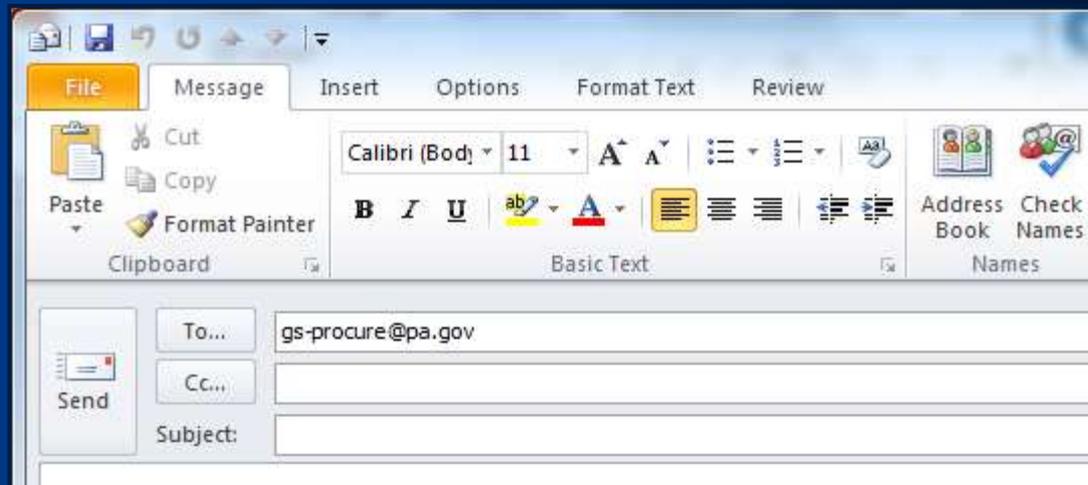
Welcome Message contains key information about the procurement handbook, and includes an e-mail hyperlink for questions or recommended updates.



# Navigating the Procurement Handbook

## Online Procurement Handbook Welcome Page

When the link is selected an e-mail will display to include questions, updates or technical issues to [gs-procure@state.pa.us](mailto:gs-procure@state.pa.us)



# Navigating the Procurement Handbook

## Online Procurement Handbook Welcome Page

### PROCUREMENT HANDBOOK PARTS

[Part I - Policies and Guidelines](#)

[Part II – Procurement of Supplies Procedures](#)

[Part III – Procurement of Services Procedures](#)

[Part IV – Procurement of Design and Construction Services](#)

[Procurement Code](#)

[Addendums](#)

[Procurement Code Thresholds](#)

Note the Procurement Handbook page is set up with hyperlinks that allow for easy navigation to each of the *Parts*.



# Navigating the Procurement Handbook

## Online Procurement Handbook Welcome Page

### PROCUREMENT HANDBOOK PARTS

[Part I - Policies and Guidelines](#)

[Part II – Procurement of Supplies Procedures](#)

[Part III – Procurement of Services Procedures](#)

[Part IV – Procurement of Design and Construction Services](#)

[Procurement Code](#)



[Addendums](#)

[Procurement Code Thresholds](#)

An additional hyperlink within the *Parts* will open the ***Procurement Code (Title 62-Procurement)***



# Navigating the Procurement Handbook

## Online Procurement Handbook Welcome Page

When the hyperlink is selected, Title 62 – Procurement Code will be displayed.

### TABLE OF CONTENTS

#### TITLE 62 PROCUREMENT

##### PART I. COMMONWEALTH PROCUREMENT CODE

##### Chapter 1. General Provisions

- § 101. Short title of part.
- § 102. Application of part.
- § 103. Definitions.
- § 104. General principles of law otherwise applicable.
- § 105. Determinations.
- § 106. Public access to procurement information (Repealed).
- § 107. Reciprocal limitations.
- § 108. Recycled materials.

##### Chapter 3. Procurement Organization

###### Subchapter A. Organization of Public Procurement

- § 301. Procurement responsibility.

###### Subchapter B. Procurement Policy

- § 311. Powers and duties.
- § 312. Procurement regulations.

###### Subchapter C. Powers and Duties of Department



# Navigating the Procurement Handbook

Now that you understand how to access the Procurement Handbook, we'll move on to understanding the *Four Parts of the Procurement Handbook*.

Select the NEXT button to proceed with the lesson.



# Four Parts of the Procurement Handbook



# Four Parts of the Procurement Handbook

## Overview

The Handbook is divided into four *Parts* with numerous *Chapters* under each *Part*.

- Part I – Policies and Guidelines
- Part II – Procurement of Supplies Procedures
- Part III – Procurement of Services Procedures
- Part IV – Procurement of Design and Construction Services



# Four Parts of the Procurement Handbook

## Overview

### PROCUREMENT HANDBOOK PARTS

[Part I - Policies and Guidelines](#)

[Part II – Procurement of Supplies Procedures](#)

[Part III – Procurement of Services Procedures](#)

[Part IV – Procurement of Design and Construction Services](#)

[Procurement Code](#)

[Addendums](#)

[Procurement Code Thresholds](#)

The Procurement Handbook *Parts* section lists the four parts of the Handbook.

This is the only version of the Commonwealth's official Procurement Handbook.



# Four Parts of the Procurement Handbook

## Overview

### PROCUREMENT HANDBOOK PARTS

[Part I - Policies and Guidelines](#) ←

[Part II – Procurement of Supplies Procedures](#)

[Part III – Procurement of Services Procedures](#)

[Part IV – Procurement of Design and Construction Services](#)

- To access a *Part*, select the hyperlink from the list



# Four Parts of the Procurement Handbook

## Overview

### Part I - Policies and Guidelines

Pt I Ch 01 General Provisions

Pt I Ch 02 Definitions

Pt I Ch 03 Responsibilities

Pt I Ch 04 Contract Use Need and Authorization

Pt I Ch 05 Contracting Process

Pt I Ch 06 Methods of Awarding Contracts

When the hyperlink is selected, the ***Part*** selected displays.



# Four Parts of the Procurement Handbook

Now that you have learned about the four *Parts* of the Procurement Handbook, we'll move on to the Chapters under each *Part*.

In the next lesson, *Chapters of the Procurement Handbook*, you will learn the steps locate and preview the numerous Chapters under each *Part* of the Procurement Handbook.

Select the NEXT button to proceed with the lesson.



# Chapters of the Procurement Handbook



# Chapters of the Procurement Handbook

## Overview

Every Chapter of the Procurement Handbook provides guidance on the various procurement policies and procedures on each of the procurement types and thresholds.



# Chapters of the Procurement Handbook

## Overview

### PROCUREMENT HANDBOOK PARTS

[Part I - Policies and Guidelines](#)

[Part II – Procurement of Supplies Procedures](#)

[Part III – Procurement of Services Procedures](#)

[Part IV – Procurement of Design and Construction Services](#)

To locate and preview the numerous ***Chapters*** under each ***Part*** of the Procurement Handbook, select the hyperlinked ***Part***.



# Chapters of the Procurement Handbook

## Overview

Once you select a particular *Part* the various *Chapters* will display with hyperlinks.

### PROCUREMENT HANDBOOK CHAPTERS

#### [Part I - Policies and Guidelines](#)

[Pt I Ch 01 General Provisions](#)

[Pt I Ch 02 Definitions](#)

[Pt I Ch 03 Responsibilities](#)

[Pt I Ch 04 Contract Use Need and Authorization](#)

[Pt I Ch 05 Contracting Process](#)

[Pt I Ch 06 Methods of Awarding Contracts](#)

[Pt I Ch 07 Thresholds and Delegations](#)

[Pt I Ch 08 Selecting Type of Contract](#)

[Pt I Ch 09 Statewide Requirements Contracts](#)

[Pt I Ch 10 Contract Formats](#)



# Chapters of the Procurement Handbook

## Overview

### PROCUREMENT HANDBOOK CHAPTERS

#### Part I - Policies and Guidelines

[Pt I Ch 01 General Provisions](#)

[Pt I Ch 02 Definitions](#)

[Pt I Ch 03 Responsibilities](#)

[Pt I Ch 04 Contract Use Need and Authorization](#)

[Pt I Ch 05 Contracting Process](#)

[Pt I Ch 06 Methods of Awarding Contracts](#)



[Pt I Ch 07 Thresholds and Delegations](#)

[Pt I Ch 08 Selecting Type of Contract](#)

[Pt I Ch 09 Statewide Requirements Contracts](#)

[Pt I Ch 10 Contract Formats](#)

To preview a specific *Chapter*, select the hyperlink from the list. For example, select Part I Chapter 06 to view this chapter on Methods of Awarding Contracts.



# Chapters of the Procurement Handbook

## Overview

Revised: July 9, 2013

### Part I Chapter 06 Methods of Awarding Contracts

#### A. Competitive Sealed Bidding.

##### 1. Conditions for Use.

- a. Contracts must, as a general practice, be awarded through the competitive sealed bidding method of award.
- b. Competitive sealed bidding is the traditional and usual method of contractor selection. It is normally used when the supply, service, or construction can be satisfactorily described and price is the only factor to be considered in the award, after bidder responsibility is determined.

When the hyperlink is selected, the *Chapter* selected will display.



# Understanding Additional Hyperlinks

## Overview

### PROCUREMENT HANDBOOK PARTS

[Part I - Policies and Guidelines](#)

[Part II – Procurement of Supplies Procedures](#)

[Part III – Procurement of Services Procedures](#)

[Part IV – Procurement of Design and Construction Services](#)

[Procurement Code](#)

[Addendums](#)

[Procurement Code Thresholds](#)

The Procurement Handbook has additional hyperlinks other than the ***Parts*** and ***Procurement Code***.

This section will describe them in further detail.



# Understanding Additional Hyperlinks

## Overview

PROCUREMENT HANDBOOK PARTS

- [Part I - Policies and Guidelines](#)
- [Part II – Procurement of Supplies Procedures](#)
- [Part III – Procurement of Services Procedures](#)
- [Part IV – Procurement of Design and Construction Services](#)

[Procurement Code](#)

[Addendums](#)

[Procurement Code Thresholds](#)

***Addendums*** hyperlink contains information to updated policies.

***Procurement Code Thresholds*** do not relate to Agencies, so disregard this hyperlink.



# Summary

Thank you for viewing the Online Procurement Handbook. You are now able to:

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# Survey

Select the link below to complete an online survey

<https://www.surveymonkey.com/s/Y2BXTXM>



Congratulations! You have completed the course. You will receive credit for completing this course within 24 hours. Please select the “Log Off” button in the lower right corner to close this course

**Thank You!**

