2.0 PSA – Creating a Proposal

Background:

Prior to creating a proposal a project with items, funding and a category must be created.

Roles:

PSA User

Navigation:

Dashboard > Project Overview > Project

1. From the Project Summary select the **Component Actions Menu** and click the Action, **Validate Project**. The warning(s) *Project does not contain a Project Midpoint,* and if no boroughs were added, *Project Counties* are expected. If there are any other warnings, make those corrections to the Project before proceeding.
2. From the Project Summary select the Project **Component Actions Menu** and click the Action: **Create Proposal.** Toggle the **Proposal Type** to one of the following options:
   - *PSA - CSP – Professional Services Agreement Competitve Sealed Proposal (if the ASPS amount is over $200,000)*
   - *PSA-SP – Professional Services Agreement Small Procurement (if the ASPS amount is below $200,000 but over $10,000)*
   - *PSA-LOA – Professional Services Agreement – Letter of Agreement (if the ASPS amount is under $10,000)*
3. Toggle the **Contract Type** to *PSA – Professional Services* and press **Save.**

4. On the Proposal Summary General tab enter the **Primary Borough ID** if applicable (if not applicable leave blank).
5. Enter the **Primary Region ID** (if not already populated from the Project). This should be the region advertising this contract.
6. Scroll down to enter the **Type of Funding**, if there are multiple federal funding sources enter *MULT - Multiple.*
7. If this is a term agreement enter the maximum amount payable in the **Max Amt Payable** field.
8. Enter any applicable **DBE goal** information, or notify the Civil Rights Office to enter that information, and press **Save**.
9. On the left hand side of the screen and select the **Time** tab, press **New** and enter the **Completion Date**. Press **Save**.
10. Select the **Sections and Items** quick link. Click the **Component Actions Menu** and select **Auto Generate Sections**.
11. At the top of the page click the **Proposal** quick link, and from the Proposal Summary press the **Component Actions Menu** and select the action, **Validate Proposal**. Review the validation and make corrections to the Proposal/Project prior to continuing to add the letting (For PSAs warnings like *Project does not contain Project Counties* or *Project does not contain a Project Midpoint* can be ignored).
12. From the Proposal Summary press the **Component Actions Menu** and under reports, select **Proposal Validation**, and then press **Execute** to run the report. Review any applicable missing or incomplete data and correct prior to adding the proposal to a letting.

Next Steps:

The next step is attaching the Proposal to a letting and advertising the proposal on BidX. Use the QRG: *3.0 PSA – Advertising*.