

Client Initiated Amendment Process

The purpose of Client Initiated Amendment Process is to allow an Agency to request an amendment to a contract that was issued by the State Procurement Office for their Agency. The authorized agency user can enter all requested changes to a draft document, Initiate the document and send to SPO for Review. SPO will pick up the document, in the review they may ask the agency user for any clarifications if needed and then process the request.

This process is not for a standard contract amendment which the agency controls the contract, nor is it to be used for an Old or Transitional amendments. These amendments follow the standard amendment process.

Table of Contents	Page 1
Log in Process	Pages 2 - 3
Internal User Help Documents	Page 4
Client Initiated Amendment Process	Pages 5 - 28
Create the Amendment request document.....	Pages 5 - 8
Verify document data.....	Page 9
Make necessary changes to the draft document.....	Pages 10
Initiate the Amendment document.....	Page 11
Send to State Procurement Office (SPO).....	Page 12 - 13
SPO processing request.....	Page 13

Log in Process

1. Open your computer to the ORPIN Web site as usual
2. Check to see if there have been any updates to the ORPIN system since the last time you logged in
3. Click on the underlined "Login to ORPIN" in the left hand menu to access ORPIN

menu

- ▶ ORPIN Home
- Login to ORPIN
- Supplier Registration
- Browse
- Registration of a Public (tax supported) Entity
- FAQ
- Subscription Levels
- How to disable your popup blocker

ORPIN

Welcome to the Oregon Procurement Information Network (ORPIN). ORPIN provides access to procurement and contracting information issued by the State of Oregon, local governments, and political subdivisions. You may browse the site as an anonymous user and see summary information. Select the "Browse" option in the left navigation bar to explore these capabilities.

If you wish to view or download the entire opportunity you will need to complete the registration process. You may register as a Basic or Premium Subscriber. Please see the "Subscription Levels" option in the left navigation bar to see the features of each subscription level.

If you have not yet registered you may register now by selecting the "Supplier Registration" option in the left navigation bar. If you are already registered you may log on now by selecting the "Logon to ORPIN" option in the left navigation bar.

If you have any questions about ORPIN, information, including answers to commonly asked questions, can be found here.

Last ORPIN Update 09/20/2006

[? Help for ORPIN](#) [Contact Us](#) | [Disclaimer](#)
[Privacy Statement](#)

Version (O&PEN 2.24.29)

Internet

A similar screen will appear

4. Login as usual
5. If you have trouble logging in click on the red instruction line “Having trouble logging in? Click here” and follow the instructions

The screenshot shows the e-Procurement ORPIN login page. On the left is a dark green sidebar with a 'menu' header and several links: 'ORPIN Home', 'Login to ORPIN', 'Supplier Registration', 'Browse', 'Registration of a Public (tax supported) Entity', 'FAQ', 'Subscription Levels', and 'How to disable your popup blocker'. The main content area has the title 'e-Procurement ORPIN (Test)' and the tagline 'Access, Browse and Compete on Opportunities at any time.' Below this is the 'Login to ORPIN' section with a question mark icon. It contains two input fields: 'User Name:' with a placeholder 'User ID' and 'Password (case sensitive):'. Below the fields are 'Submit' and 'Reset' buttons. A red arrow points to the 'User ID' field with the text 'Enter User ID here'. Another red arrow points to the password field with the text 'Enter your Password here'. A third red arrow points to the 'Submit' button with the text 'Click here'. Below the password field is a red link: 'Having trouble logging in? Click here'. At the bottom of the page, there are links for 'Help for ORPIN', 'Contact Us | Disclaimer | Privacy Statement', and 'Version (O&PEN 2.24.29)'. The browser's address bar at the bottom shows 'Internet'.

A similar screen will appear

6. Help on how to progress various types of documents in the system is available for Internal Users

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- [My Documents](#)
- [Browse Suppliers](#)
- [Create Documents](#)
- [Verify/Change Your Information](#)
- [Browse Commodity Code](#)
- [Reporting/Inquiry](#)
- [ORPIN Time](#)
- [Exit from ORPIN](#)

Hello Delegated Buyer - Agency

ODOT - Agency - Transportation Commission

The last time you logged onto the system was: 01/09/2007 9:15 AM

Welcome to ORPIN

The Navigation menu on the left includes links to all functions you have been authorized to use in the ORPIN system.

Note: The ORPIN system will be offline at approx. 7:00 AM Tuesday morning for 1-2 hours.

Internal User Help

- [How to progress a PR to SPO](#) (updated 01/05/2006)
- [QRF Price Determination Request](#) (updated 01/05/2006)
- [QRF Contract Amendment w/Price Adjustments](#) (updated 01/05/2006)
- [Special Requests](#) (delegation, exemption, special procurement, sole source) etc.- To be posted
- [Client Initiated Amendment](#) - To be posted

If you are unsure how to use on the processes list to the left, click on the title for instructions

Client Initiated Amendment Process

7. Select Create Documents to start the process

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- [My Documents](#)
- [Browse Suppliers](#)
- [Create Documents](#)
- [Verify/Change Your Information](#)
- [Browse Commodity Code](#)
- [Reporting/Inquiry](#)
- [ORPIN Time](#)
- [Exit from ORPIN](#)

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- Special Requests (delegation, exemption, special procurement, sole source) etc.- To be posted
- Client Initiated Amendment - To be posted

Click here

Help for ORPIN

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Version (O&PEN 2.24.31)

A similar screen will display

8. Select “Client Initiated Amendment in either the left hand menu or on the main page

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- [My Documents](#)
- [Browse Suppliers](#)
- ▶ **Create Documents**
 - Create a Special Request
 - Create a Notice
 - Create a Purchase Request
 - Create an Opportunity
 - Create an Award/Report ORS 190
 - Create a Work Order
 - Create a Client Initiated Amendment

Create Documents

(Test)

Create a Special Request
Create a Special Request (Delegation, Special Procurement, Sole Source, Other Special Request) and send to SPO

Create a Notice
Create a variety of Notice postings including ORCPP Opportunity

Create a Purchase Request
Create a Purchase Request

Create an Opportunity
Create and Post an Opportunity

Create an Award/Report ORS 190
Create Price Agreement, Agreement to Agree, or other Contract documents or Report an ORS 190 Activity

Create a Work Order
Create a Work Order against an Agreement to Agree

Create a Client Initiated Amendment
Create an Amendment draft for a Contract issued on your agency's behalf by SPO

Select here or here

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Internet

A similar screen will display

9. Enter the document number for the award you wish to have amended and then click on "Submit"

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- [My Documents](#)
- [Browse Suppliers](#)
- ▶ [Create Documents](#)
 - Create a Special Request
 - Create a Notice
 - Create a Purchase Request
 - Create an Opportunity
 - Create an Award/Report ORS 190
 - Create a Work Order
- ▶ [Create a Client Initiated Amendment](#)

Create a Client Initiated Amendment Request

(Test)

ⓘ To create an Client Initiated Amendment Request, first search for the contract. Once you have found the contract, click on the "Create a Client Initiated Amendment Request" icon.

Find Document ⓘ

Document #:

Enter number here and then click here

ⓘ [Help for ORPIN](#) [Contact Us](#) | [Disclaimer](#) | [Privacy Statement](#) Version (O&PEN 2.24.29)

Done Internet

A similar screen will appear

10. Click on the Show/Hide button to verify the document is under SPO control and it was issued for your agency. Once verified click on the ribbon

Create a Client Initiated Amendment Request
(Test)

To create an Client Initiated Amendment Request, first search for the contract. Once you have found the contract, click on the "Create a Client Initiated Amendment Request" icon.

Find Document

Document #:

Legend

Click here and verify here

Document #	Document Type	Document Subtype	Status
1 PS-NON-IT2480-5	Award	Personal Services (PSK) Non-IT	Complete
Quality Assurance (QA) Services for Information Technology			
Amend	Document Issued By	Document Issued For	
2	State Procurement Office	ODOT - Central Services	
Responsible	Document Date	Issued Date	Published Date
Rockwell, Margaret	10/31/2006	10/31/2006	

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Create a Client Initiated Amendment Request
(Test)

To create an Client Initiated Amendment Request, first search for the contract. Once you have found the contract, click on the "Create a Client Initiated Amendment Request" icon.

Find Document

Document #:

Legend

Click here

Document #	Document Type	Document Subtype	Status
1 PS-IT-AE-1065-5	Award	Personal Services (PSK) IT	Complete
Metaserver and Java Developer Services and Coldfusion MX Prog.			

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A similar screen will display

11. Verify data and check for an existing Price Agreement

Create Amendment
(Test)

? This page allows you to review your information before creating the document. It also handles any additional information needed such as Calendar Year.

Additional Information Create

Discipline:	Personal Services IT
Document Type:	Personal Services (PSK) IT
Procurement Method:	Client Initiated Amendment
Issued By:	State Procurement Office
Issued For:	ODOT - Central Services
Supplier:	Scicom Americas, Inc.
Calendar Year:	* <input checked="" type="radio"/> Current Calendar Year <input type="radio"/> Next Calendar Year

I agree that there is no existing Price Agreement that will fulfill the purpose of this Request.
Browse Contracts

* indicates a required field Check here Top

Verify

The screenshot shows a web browser window with the 'Create Amendment' form. Red arrows point from the text 'Verify' to the 'Document Type' and 'Supplier' fields. Another red arrow points from 'Check here' to the 'I agree...' checkbox. A 'Browse Contracts' button is also highlighted with a red arrow.

12. Click on "Create"

Create Amendment
(Test)

? This page allows you to review your information before creating the document. It also handles any additional information needed such as Calendar Year.

Additional Information Create

Discipline:	Personal Services IT
Document Type:	Personal Services (PSK) IT
Procurement Method:	Client Initiated Amendment
Issued By:	State Procurement Office
Issued For:	ODOT - Central Services
Supplier:	Scicom Americas, Inc.
Calendar Year:	* <input checked="" type="radio"/> Current Calendar Year <input type="radio"/> Next Calendar Year

I agree that there is no existing Price Agreement that will fulfill the purpose of this Request.
Browse Contracts

* indicates a required field Top

Click here

The screenshot shows the same web browser window as in step 11. A red arrow points from the text 'Click here' to the 'Create' button in the top right corner of the form.

A similar screen will appear

13. Make any adjustments for the Amendment changes you are requesting

Document Summary - Microsoft Internet Explorer provided by DAS


menu

- Close
- Print (HTML)
- PDF Not Available
- Document
- Data
- Contact Information
- Comments & Clauses
- Supplier Insurance
- Secondary Suppliers
- Actions
- Amendments / Revisions
- Amendment Reason
- Permitted Users
- Progressions
- Check Integrity
- Process History
- Delete
- Clone
- View Summary
- Create PDF
- Forward
- Email Agent List
- Refresh

Award Summary
Personal Services (PSK) Non-IT
Quality Assurance (QA) Services for Information Technology
(Test)

ORPIN
Oregon Procurement Information Network

Supplier Address

 Solutions Consulting Group, LLC
1911 SW Campus Dr. #457
Federal Way, WA, Oregon 98023

Contact: Ken Disbrow
Phone: 1 (253) 529-8500
Fax: 1 (253) 529-8863
Email: kdisbrow@pubknow.com

Draft

Contract # PS-NON-IT2480-5
Amendment # 3 Revision Date
Opportunity # 102-5505-5
Contract Start Date 02/28/2006
Expiration Date 02/28/2009
Supplier Number 1710

All dates are mm/dd/yyyy

Attachments Exist
Secondary Suppliers Do Not Exist

Contract Administrator	Receiving Address	Agreement Filed At
State Procurement Office 1225 Ferry Street S.E., U140 Salem, Oregon 97301-2485	ODOT - Central Services 555 13th Street NE, Suite 1 Salem, Oregon 97301-4166	DAS SPO

Contact: Margaret Rockwell
Phone: 1 (503) 378-4684
Fax: 1 (503) 373-1626
Email: margaret.rockwell@das.state.or.us

Contact: Tim Avilla
Phone: 1 (503) 986-3231
Fax: 1 (503) 986-4072
Email: timothy.c.avilla@odot.state.or.us


Amendment # 3- Test of process
Amendment # 2 To change the dollar limitations during the contractual period. See the

Internet

14. Once you have made all the changes, make a list of them and note them under the Amendment reason

15. Click on "Initiate" in the left hand menu to send the Amendment Request to SPO

The screenshot displays the ORPIN web interface. On the left is a vertical navigation menu with options like 'Document', 'Data', 'Contact Information', 'Comments & Clauses', 'Supplier Insurance', 'Secondary Suppliers', 'Actions', 'Amendments / Revisions', 'Amendment Reason', 'Permitted Users', 'Progressions', 'Check Integrity', 'Process History', 'Delete', 'Clone', 'View Summary', 'Create PDF', 'Forward', 'Email Agent List', 'Refresh', and 'Initiate'. A red arrow points to the 'Initiate' button. The main content area is titled 'Award Summary' and includes the ORPIN logo. The contract details are as follows:

	Supplier Address Solutions Consulting Group, LLC 1911 SW Campus Dr. #457 Federal Way, WA, Oregon 98023	Draft
	Contact: Ken Disbrow Phone: 1 (253) 529-8500 Fax: 1 (253) 529-8863 Email: kdisbrow@pubknow.com	Contract # PS-NON-IT2480-5 Amendment # 3 Revision Date
		Opportunity # 102-5505-5 Contract Start Date 02/28/2006 Expiration Date 02/28/2009 Supplier Number 1710

All dates are mm/dd/yyyy

Attachments Exist
Secondary Suppliers Do Not Exist

Contract Administrator State Procurement Office 1225 Ferry Street S.E., U140 Salem, Oregon 97301-2485	Receiving Address ODOT - Central Services 555 13th Street NE, Suite 1 Salem, Oregon 97301-4166	Agreement Filed At DAS SPO
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Click here

Contact: Margaret Rockwell Phone: 1 (503) 378-4684 Fax: 1 (503) 373-1626 Email: margaret.rockwell@das.state.or.us	Contact: Tim Avilla Phone: 1 (503) 986-3231 Fax: 1 (503) 986-4072 Email: timothy.c.avilla@odot.state.or.us
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Amendment # 3- Test of process

A similar screen will display

16. Your current step is to Initiate the Amendment Request

17. The next step is to progress the Amendment Request to SPO

Review/Approve
(Test)

Submit/Return
01/31/2007 10:09 AM

Document #: PS-NON-IT2480-5

Amendment: 3

Current Step: Initiate **Current Step**

Next Step: *SPO Review **Next Step**

Person Responsible for Next Step: *

Send email to person responsible for the document?

* Indicates a required field

18. Pick the Person Responsible for the next as indicated below, then click on “Submit/Return”

Review/Approve
(Test)

Submit/Return
01/31/2007 10:09 AM

Document #: PS-NON-IT2480-5

Amendment: 3

Current Step: Initiate

Next Step: *SPO Review

Person Responsible for Next Step: *

Send email to person responsible for the document?

* Indicates a required field

See chart on next page for choices under “Select Person Responsible”

```
Select Person Responsible
-- ODOT - Central Services --
-- ODOT - Oregon Department of Transportation --
-- ODOT - Agency - Transportation Commission --
-- OAC Agencies... --
-- DAS Authority Agencies --
-- Executive --
_Select to send for processing, SPO PR Forwarding Account -
-- State Government --
-- ORPIN System --
```

Select this one



19. The document is now out of your control and at SPO
20. Send e-mail to SPO buyer that document is in the SPO processing box
21. SPO takes over the processing of the Amendment Request
22. If there are any questions SPO may make contact by phone or e-mail for clarifications
23. SPO could send the document back to the agency for further details. The agency representative would go back to step 13 provide the details and follow the steps as previously described