



QUICK REFERENCE GUIDE:

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 Competitive 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. Enter the **Type of Funding**, if there are multiple federal funding sources enter **MULT - Multiple**.
7. Enter any applicable **DBE goal** information, or notify the Civil Rights Office to enter that information, and press **Save**.
8. Select the **Time** tab, press **New** and enter the **Completion Date**. Press **Save**.
9. Select the **Sections and Items** quick link. Click the **Component Actions Menu** and select **Auto Generate Sections**.
10. 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).
11. 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*.

If you need further assistance please contact your Module Admin
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