

STEP Update

Changes to process for recording contracts in the
STEP Datasheet at the evaluation stage



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Rationale and summary of the change

The new Step change

At the evaluation stage, users will now be required to save the date (of evaluation) after creating all the contracts/lots and recording the evaluation details including all bidders evaluated in the STEP data sheet. Users can no longer save the evaluation date before confirming that relevant details have been recorded.

Rationale for the change

This addresses the problems experienced by users in recording evaluation details where the date of evaluation is saved before fully recording the evaluation details in the STEP datasheet. This was especially experienced for activities with multiple lots/contracts where users recorded a single lot and saved the date before adding other lots.

Summary of changes:

- ✓ Recording of the details of evaluated contracts is now required before saving the date of the evaluation
- ✓ For activities with multiple lots/contracts, all evaluation details for all lots are recorded before saving the date.
- ✓ User is prompted to confirm that all the above details have been recorded before saving the date
- ✓ Applicability: Changes apply for Post Review contracts.

Stage to which changes apply: Bid Evaluation

Applicable Stage:

- At Bid Evaluation Report/
Combined report for RFB and
RFQ and / Draft Evaluated
Contract for Direct Selection and
ICS

Applicable Review Type:

- The change currently only
applies the post-review
contracts

Home / Project Details (P123961) / Procurement Plan / Activity Details and Roadmap

Activity (Anita Testing Ministry)

Project: Vietnam Road Asset Management Pro... (P123961) | Reference: AQ-ATM-2705411-GO-RFB | Status: ● Cleared | Under Implementation

Activity Details

- Key Details
- Related Information
- Additional Details

Procurement Roadmap

Procurement Planning	Original Date / Days	Revised Date / Days	Running Date / Days	Actual Dates
<input checked="" type="checkbox"/> Draft Bidding Documents	07-Feb-2023 / 0	07-Feb-2023 / 0	01-Feb-2023 / 0	01-Feb-2023
<input type="checkbox"/> Specific Procurement Notice	12-Feb-2023 / 5	12-Feb-2023 / 5	06-Feb-2023 / 5	
<input type="checkbox"/> Amendments to Bidding Documents			06-Feb-2023 / 0	
<input checked="" type="checkbox"/> Bid Submission/Opening/Minutes	26-Mar-2023 / 42	26-Mar-2023 / 42	02-Feb-2023 / -4	02-Feb-2023
<input type="checkbox"/> Bid Validity Extension			02-Feb-2023 / 0	
<input checked="" type="checkbox"/> Bid Evaluation Report and Recommendation for Award	25-Apr-2023 / 30	25-Apr-2023 / 30	04-Mar-2023 / 30	
<input type="checkbox"/> Notification of Award	09-May-2023 / 14	09-May-2023 / 14	18-Mar-2023 / 14	
Procurement Monitoring	Original Date / Days	Revised Date / Days	Running Date / Days	Actual Dates

3 STEP Process in recording evaluated contract details

- **Step 1:** Upload the relevant support document e.g. the Bid Evaluation Report in the Documents tab
- **Step 2:** Record the details of ALL the evaluated contracts
- **Step 3:** Enter and save evaluation date. Date field is not clickable until at least 1 evaluated contract is added in the above step 2

Home / Project Details (P123961) / Procurement Plan / Activity Details and Roadmap / Bid Evaluation Report and Recommendation for Award

Bid Evaluation Report And Recommendation For Award

Project: Vietnam Road Asset Management Pro... (P123961) | Reference: AQ-ATM-27055-GO-RFB | Status: ● Cleared | Under Implementation


Documents **Datasheet**

Prequalification/Shortlist/Identified Suppliers


Will the contract evaluation require the procurement review process to be changed from Post to Prior Review? Yes No

[Save](#)

Date this action occurred *
(Record the date after creating all contracts under this activity below)

 **Date entry**

[Save](#)




 **Evaluated Contracts**

Currently there are NO Contracts created. Please ADD a contract to get started.

[+ Add Contract](#) **Record evaluated contract**

[< Back](#) [Continue](#)

Check Entries

-  Bid Evaluation Report and Recommendation for Award
-  Documents
-  Datasheet

STEP 1: Upload a copy of the BER in the documents tab

Home / Project Details (P123961) / Procurement Plan / Activity Details and Roadmap / Bid Evaluation Report and Recommendation for Award

Bid Evaluation Report And Recommendation For Award

Project: Vietnam Road Asset Management Pro... (P123961) | Reference: AQ-ATM-27055-GO-RFB | Status: ● Cleared | Under Implementation

Documents Datasheet

▲ Mandatory Documents *

Currently there are no mandatory documents

Click to attach the Bid Evaluation Report (BER)



Attach: |

▲ Supporting Documents

Currently there are no supporting documents

Attach any other relevant documents



Attach:

Check Entries

- 1 Bid Evaluation Report and Recommendation for Award
- 1 Documents
- 1 Datasheet

Attach the relevant documents in the documents tab

No changes have been made to this STEP and users continue to record the details as has been the case before

STEP 2: Record the evaluated contract/lot details

Home / Project Details (P123961) / Procurement Plan / Activity Details and Roadmap / Bid Evaluation Report and Recommendation for Award

Bid Evaluation Report And Recommendation For Award

Project: Vietnam Road Asset Management Pro... (P123961) | Reference: AQ-ATM-2705411-GO-RFB | Status: ● Cleared | Under Implementation

Documents **Datasheet**

Prequalification/Shortlist/Identified Suppliers
Evaluated Contracts

Evaluated Contracts

Contract 1

Description *

Supply and distribution. 25/200

Duration * Evaluation Currency *

Select/Deselect Firms/Individuals evaluated for the contact *

Search

<input type="checkbox"/>	ABCD (650125)
<input type="checkbox"/>	ABCD (650124)
<input type="checkbox"/>	CLIMATE EVERYCORNER (650123)
<input type="checkbox"/>	CLIMATE SMART CORP (650122)

Recording of evaluation contract details includes :

- Contract description,
- Contract duration,
- Contract currency (there is ability to choose multiple currencies).
- Selection of evaluated bidders/ suppliers including their bid and evaluated prices

Note: No changes have been made to this STEP and users continue to record the details of the evaluation of bidders as has been the case before

STEP 3: Record the date of evaluation

Home / Project Details (P123961) / Procurement Plan / Activity Details and Roadmap / Bid Evaluation Report and Recommendation for Award

Bid Evaluation Report And Recommendation For Award

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Documents **Datasheet** Review

Prequalification/Shortlist/Identified Suppliers

Will the contract evaluation require the procurement review process to be changed from Post to Prior Review? Yes No

Save

Date this action occurred *
(Record the date after creating all contracts under this activity below)



Please enter date this action occurred



Save

Evaluated Contracts

+ Add Contract



Contract 1

SUPPLY AND DISTRIBUTION

Duration: 90 Days | Currency: United States Dollars (USD)



Contract 2

School tables

Duration: 90 Days | Currency: United States Dollars (USD)

< Back

Continue

Check Entries

1 Bid Evaluation Report and Recommendation for Award

✓ Documents

1 Datasheet

- ✓ Two contracts details are recorded, this is confirmed with a green tick
- ✓ The date entry field becomes available for recording

Validation of completion of data entry

Home / Project Details (P123961) / Procurement Plan / Activity Details and Roadmap / Bid Evaluation Report and Recommendation For Award

Bid Evaluation Report And Recommendation For Award

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Documents | Datasheet

Will the contract evaluation require the procurement review process to be changed from Post to Prior Review? Yes No

Save

Date this action occurred *
(Record the date after creating all contracts under this activity below)

05-Feb-2023

Save

Evaluated Contracts

- ✔ **Contract 1**
Supply and distribution.
Duration: 90 Days | Currency: United States Dollars (USD)
- ✔ **Contract 2**
Supply and Maintenance
Duration: 90 Days | Currency: United States Dollars (USD)

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Confirm ✕

Saving the date will move the activity to the next stage. If the activity includes multiple lots/contracts please confirm that all contracts are added before saving the date. Click OK to confirm or Cancel to return.

- ✓ System now prompts user to confirm that details are fully recorded.
- ✓ Validate the information & documents entered before saving, as you will not be able to make any changes after this.
- ✓ User not able proceed with the subsequent steps until the current step has been finalized
- ✓ Once the Actual date is entered ensure to click on **"SAVE"**. NB: Clicking continue will not save the date
- ✓ Click **"OK"** to continue or CANCEL to keep the step open for entry.

THANK YOU

PLEASE CONTACT THE PROCUREMENT SPECIALIST AT THE WORLD BANK FOR ANY QUESTIONS