STEP Update

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



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.

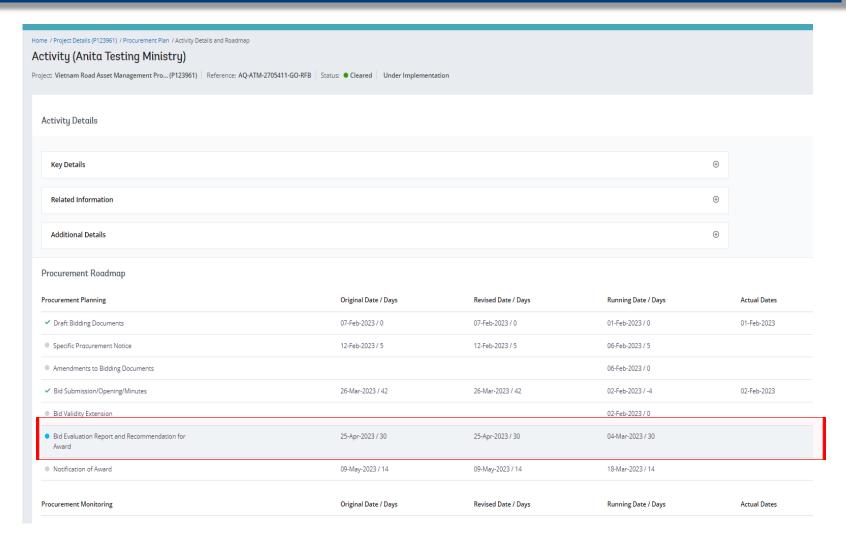
Stage to which changes apply: Bid Evaluation

Applicable Stage:

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

Applicable Review Type:

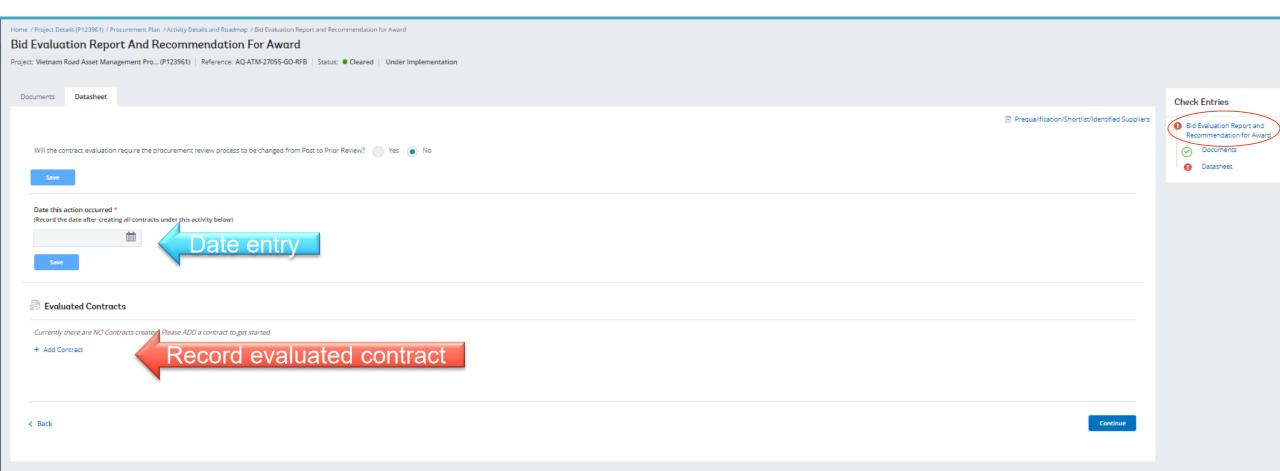
➤ The change currently only applies the post-review contracts



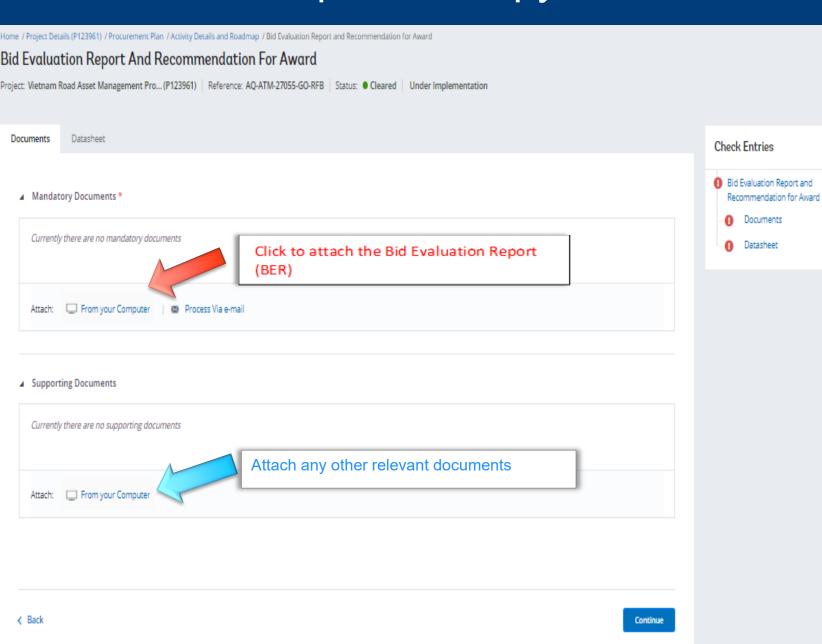


3 STEP Process in recording evaluated contract details

- 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



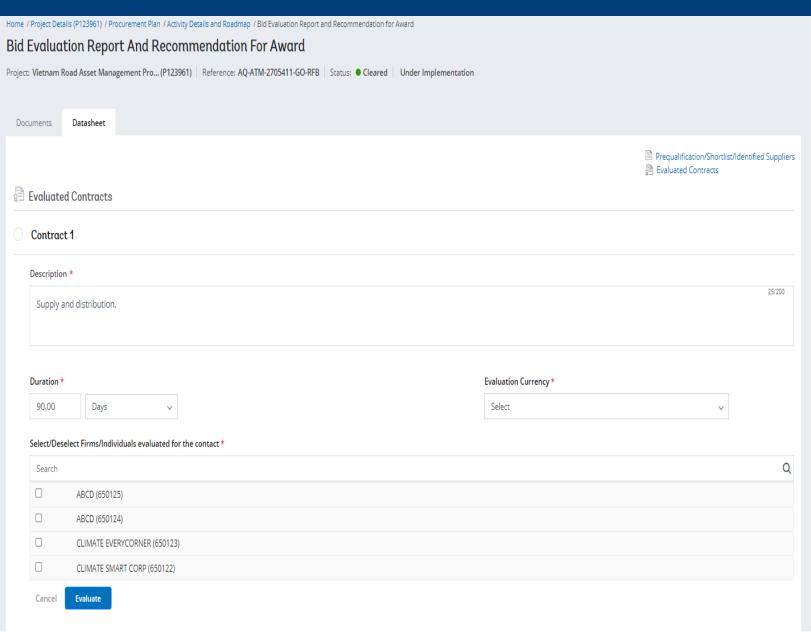
STEP 1: Upload a copy of the BER in the documents tab



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

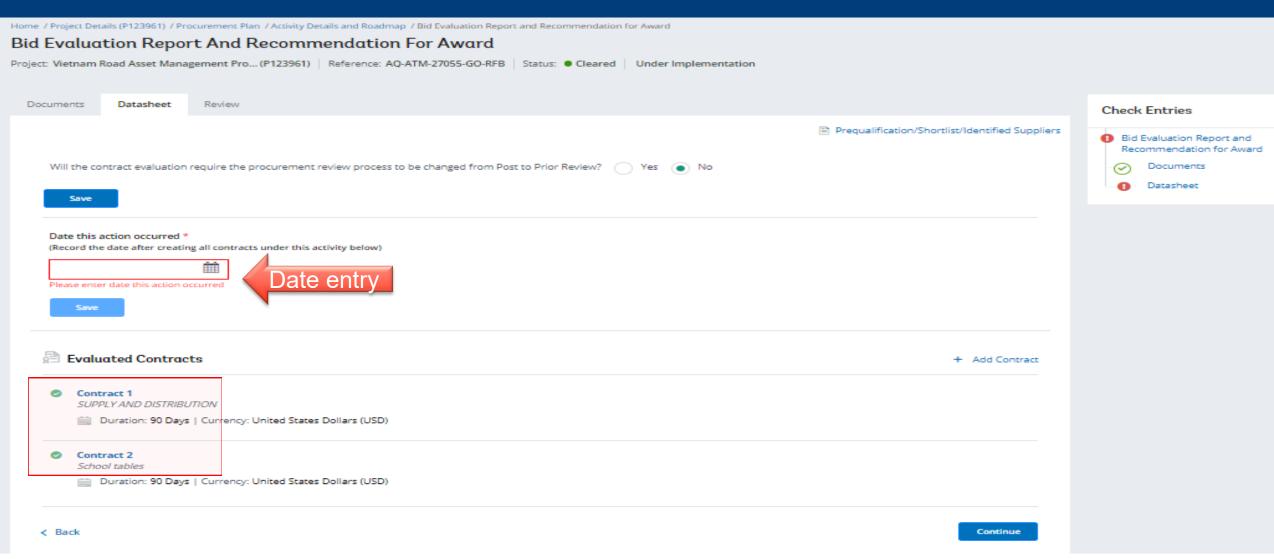


Recording of evaluation contract details includes :

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

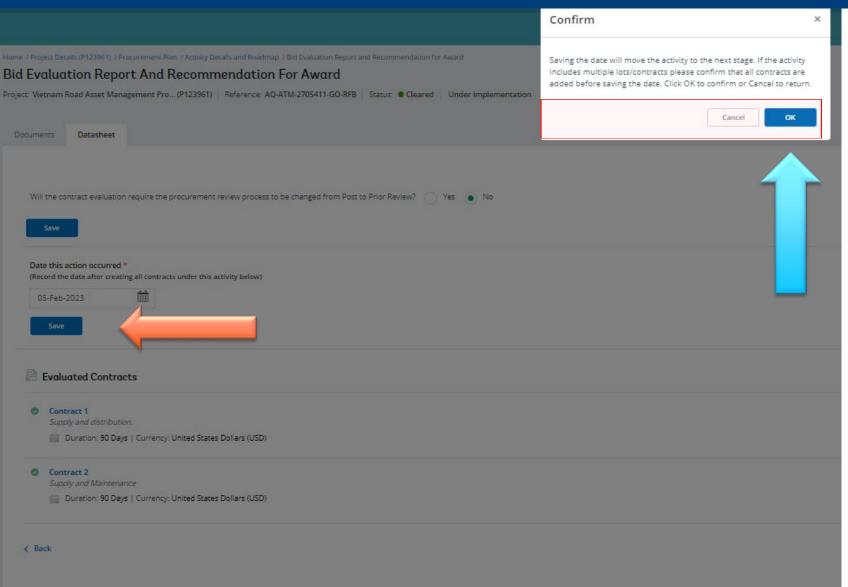
Note: No changes have been made to this STEP and users continue to record the details of the evaluation of bidders as has been the case before

STEP 3: Record the date of evaluation



- ✓ 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



- ✓ 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