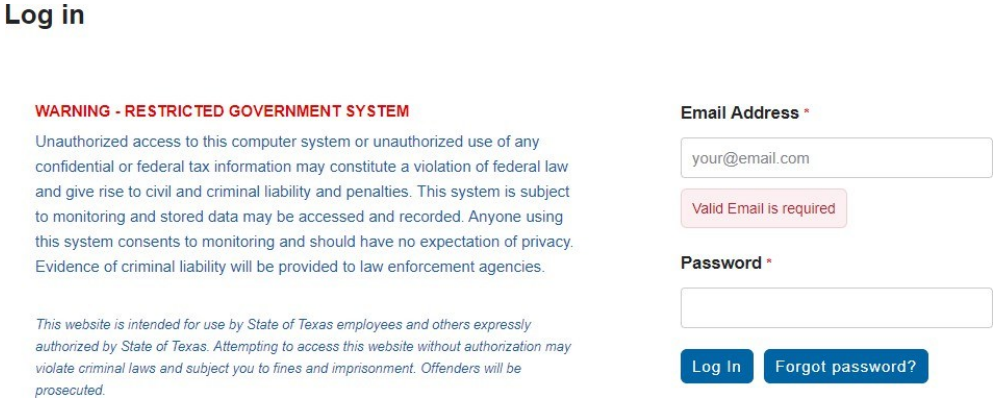
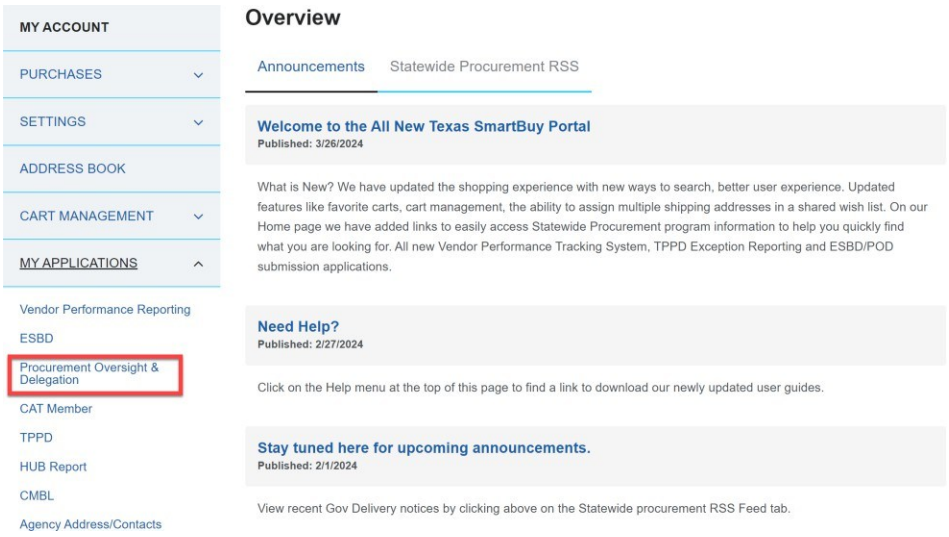
Procurement Oversight & Delegation (POD) System User Guide

To begin the POD submission process, users must first have a Texas SmartBuy account and be granted access to the POD application by one of your agency's Super Users.

Go to Texas SmartBuy, click the **Login** button, and enter your credentials to begin.

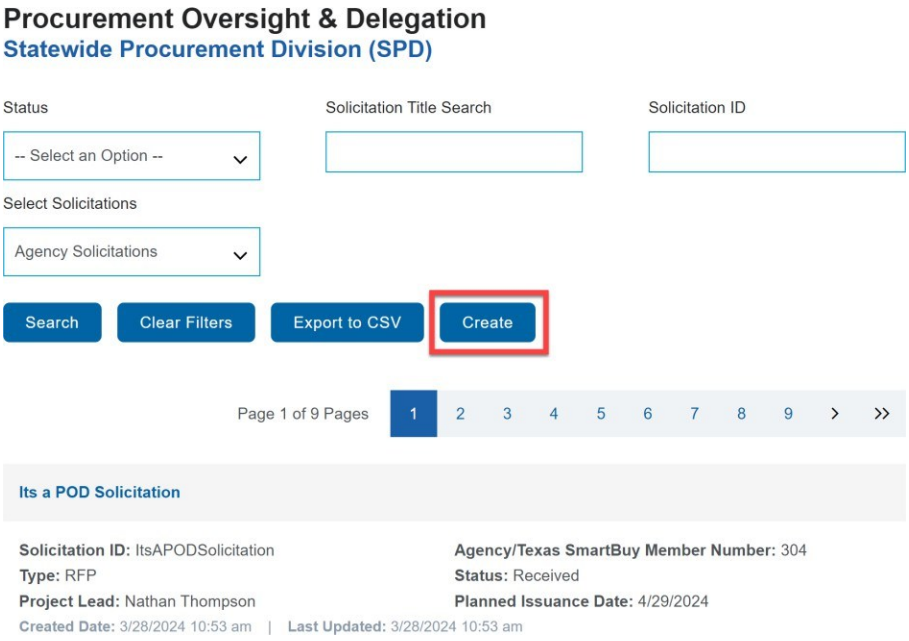


Once logged in, each user can complete an online form to initiate an agency request for a solicitation review. Under the **My Applications** section, click the **Procurement Oversight & Delegation** tab.



After clicking **Procurement Oversight & Delegation**, you will be directed to an online form where users can search for POD submissions that are currently in the review process, as well as those that have already been completed.

Select the **Create** button under the search filters. The system will direct the user to the Procurement Oversight & Delegation record creation form. Some fields will auto-populate based on the user's account information. All fields are required, except **Solicitation Comments**. Users will not be allowed to proceed to the next step if any required information is missing.



Note: There is no save button. Be sure you have all necessary information before beginning. The record is only saved and submitted to the POD team after all forms have been completed.

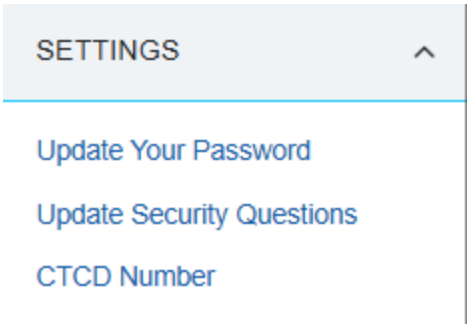
Description of Fields on the General Information Tab

Did your agency review SPD Term and TXMAS contracts and DIR Cooperative Contracts to determine that the goods or services are not available? Depending on which applies to your solicitation, you must review the active SPD Term, SPD TXMAS, or the DIR Cooperative contract before beginning your POD submission to make sure there is no existing contract you can use. If you answer "No", you will be provided with links to search for these contracts.

Purchasing Agency Number & Purchasing Agency Name – Your agency number and name are pulled from your account and pre-populated. These fields cannot be edited. You can only submit a POD request for the agency you work for. If you create solicitations for more than one agency, you will need to sign out and login to the account associated with that agency.

Project Lead Name, Project Lead Email Address, Project Lead Phone Number – These fields are auto-populated based on your account. You may update these fields as needed.

State Agency Procurement Certification & CTCD Certification – To submit a solicitation or a POD request, you must have a CTCD certification or be an attorney. If you are not exempt as an attorney, you must enter your CTCD number in this field. You may also save your CTCD number so the field is auto populated. To do so, select the **Settings** tab and click the **CTCD Number** link as shown in the image below.



Solicitation ID – The ID must be unique to this solicitation. When the POD process is complete, this ID will also be the ID for that solicitation that is created on the ESBD. Solicitation ID may only contain alphanumeric characters with exceptions for the following characters:

- Dash (-)
- Underscore (_)
- Period (.)

Solicitation Name – Enter the name of the solicitation here.

Solicitation Type – Select what kind of solicitation you are creating from the drop-down list.

Solicitation Description – Enter the solicitation description here.

Solicitation Comments (Optional) – If there are additional details the POD team needs to know about your solicitation, enter them here.

Is the solicitation sole source/proprietary? Select "Yes" or "No" from the drop-down box.

Expected Return Date – This field is fixed. It is auto populated to 30 days out. If you need your review expedited, you have the option to request this later in the form.

Planned Posting Date – Date must be greater than 30 days from today. If you need to change this date in your solicitation once the POD is complete, you may do so before you post your solicitation within the ESBD.

Procurement Oversight & Delegation
Statewide Procurement Division (SPD)

General Information

1. General Information / 2. NIGP Codes / 3. Estimate / 4. Review / 5. File Upload / 6. Confirmation

Project Information

Did your agency review SPD Term and TXMAS contracts and DIR Cooperative Contracts to determine that the Goods or Services are not available?

Purchasing Agency Number

304

Purchasing Agency Name

Comptroller Of Public Accounts - 304

Project Lead Name

Dan Smith

Project Lead Email Address

Dan.Smith@cpa.texas.gov

Project Lead Phone Number

(512) 555-5555

State Agency Procurement Certification

Dual CTCD/CTCM certification

CTCD Certification Number (10 Digits)

1234567891

Solicitation Information

Solicitation ID

Solicitation Name

Solicitation Type

-- Select Option --

Solicitation Description

Solicitation Comments (Optional)

Is the solicitation sole source/proprietary?

-- Select Option --

Dates

All solicitations submitted to the Procurement Oversight and Delegation program for review will be completed in the order received and may take up to 30 days to complete. Even if the review period exceeds 30 days, the agency does not have the authority to issue the solicitation until it receives a letter of delegation from SPD. If the solicitation package is incomplete or in draft form, the Procurement Oversight and Delegation program will request that the solicitation package be completed by the agency before entering it into the queue for review.

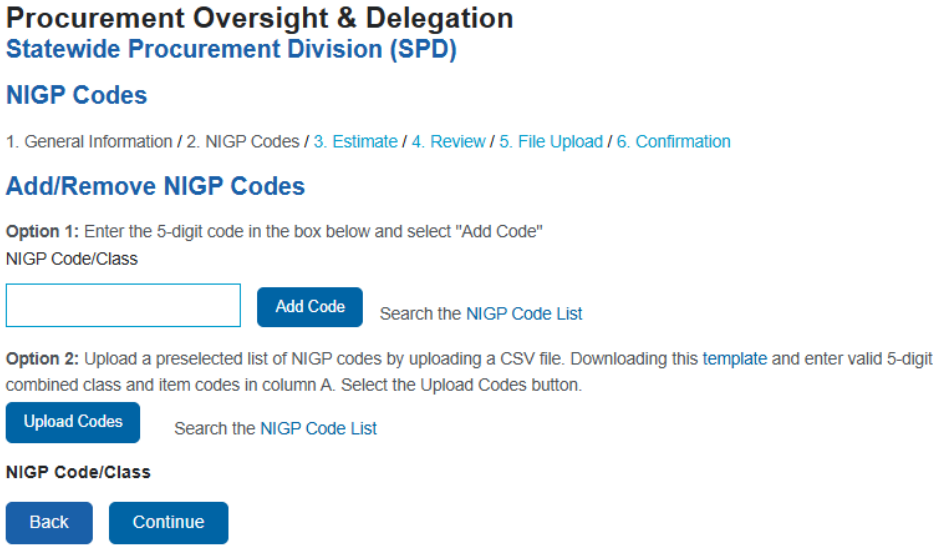
Expected Return Date

11/13/2026

Planned Posting Date

Continue

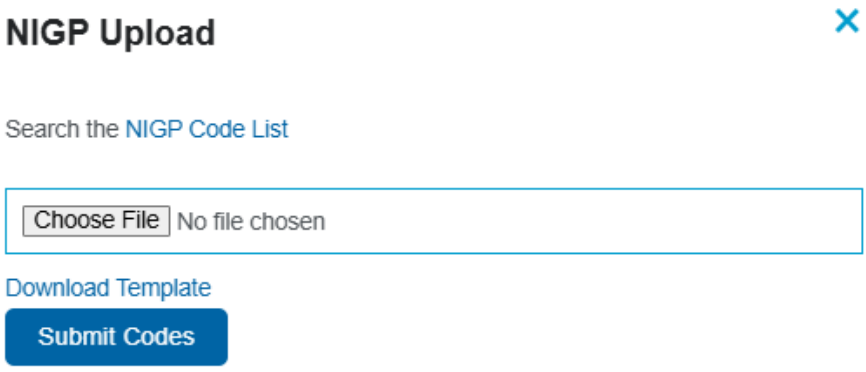
NIGP Codes – This step requires you to assign at least one NIGP code to the solicitation. There are two options for doing so.



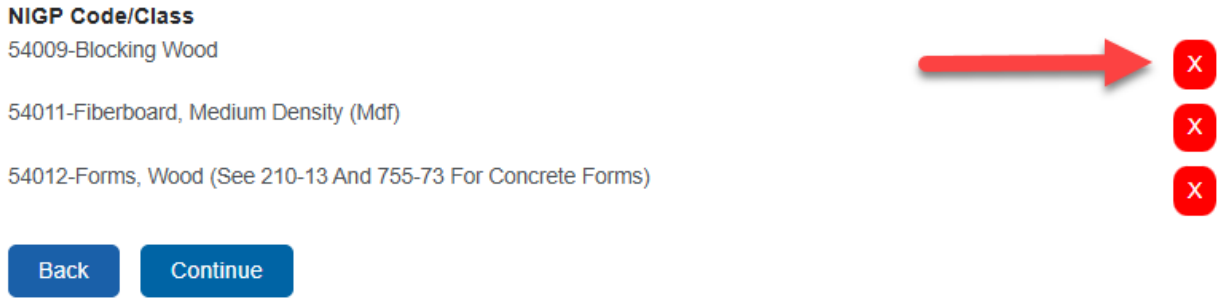
Option 1: To add an NIGP code, enter the five-digit class and item code combo into the Class/Item field and select the **Add Code** button. Do not enter the dash in the five-digit code. As you enter your class and item code, you will notice a type-ahead feature. You may select from the available choices or simply type your class and item code. Multiple NIGP codes are allowed to be added to the solicitation by repeating this step.

Option 2: You may upload a list of NIGP codes using the **Upload Codes** button. Pressing this button will initiate a pop up. Download the template, enter the five-digit NIGP codes into the first column. Save this template to your computer in the .csv format. Next, press the choose file button, select the file, then press the **Submit Codes** button. If any of the NIGP codes in this file do not exist, none of the NIGP codes will be uploaded.

Note: CSV file types will remove leading zeros by default. To make sure these are not removed upon save, highlight the cells that have the leading zero, right click and choose format cells. Choose Special under Categories and select Zip Code.



If an added code does not apply, it can be removed by pressing red "X" to the right of the code.



A reference to NIGP codes is available as a link labeled "NIGP Code List". Enter your codes and select **Continue**.

Delegation & Estimated Total Value

What is the estimated total value of the contract? (This amount is the initial value plus renewals.) – Contract value is defined in the procurement guide as "the estimated dollar amount that a state agency may be obligated to pay pursuant to the contract and all executed and proposed amendments, extensions and renewals of the contract." Enter the estimated value of your contract here.

How many times has this product/service been solicited by your Agency? Enter how many times your agency has solicitated this product/service before. Regardless of whether those solicitations were awarded or not.

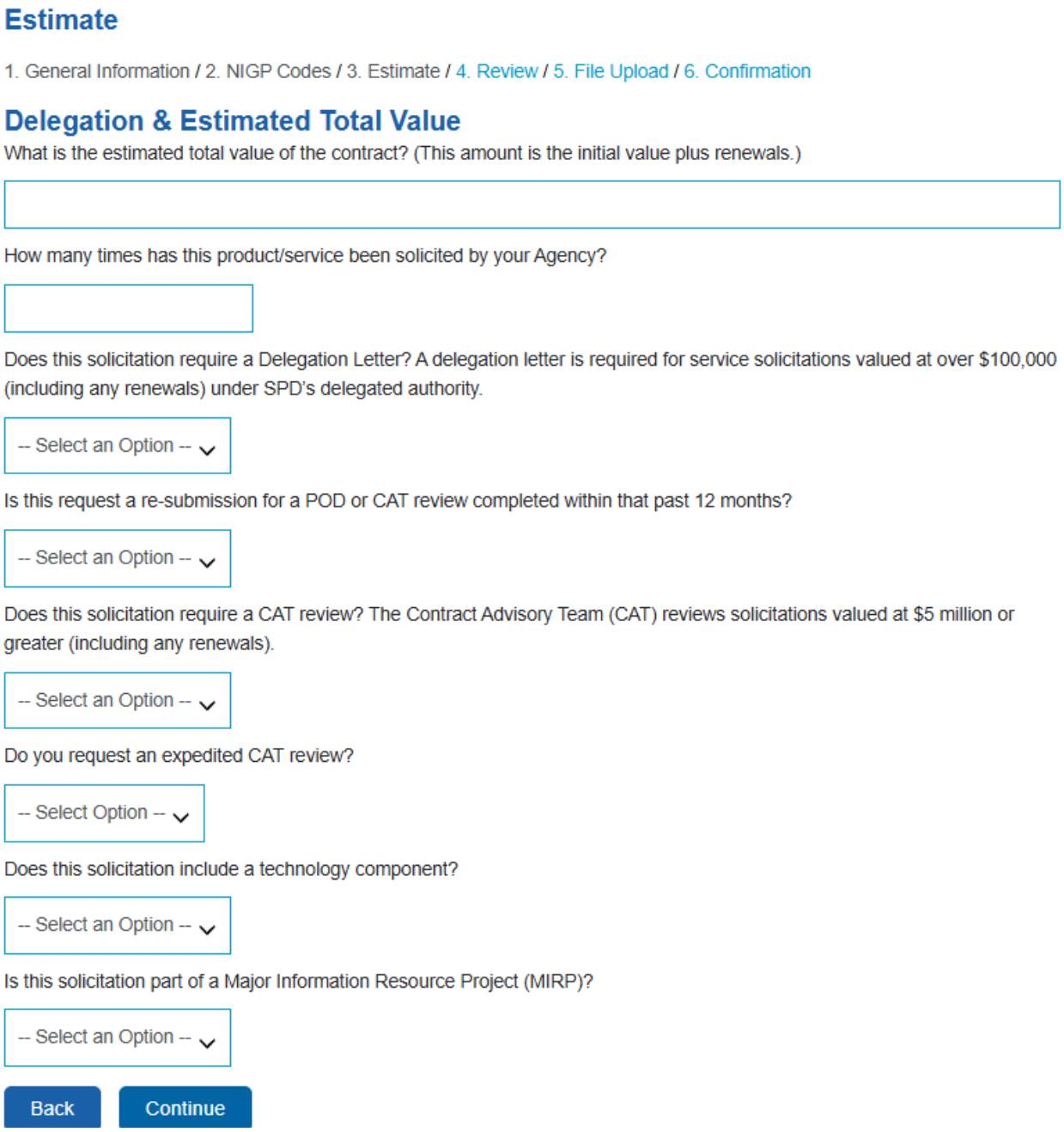
Does this solicitation require a Delegation Letter? A delegation letter is required for service solicitations valued at over $100,000 (including any renewals) under SPD's delegated authority. – The solicitation requires a delegation letter if is over $100,000 and under $5,000,000.

Is this request a re-submission for a POD or CAT review completed within that past 12 months? If a review of this same procurement attempt has been completed within the past 12 months answer "Yes" to this question. If you answer "Yes", be prepared for an email from the POD team requesting the solicitation ID of that previous submission.

Does this solicitation require a CAT review? The Contract Advisory Team (CAT) reviews solicitations valued at $5 million or greater (including any renewals). – This question will default to "Yes" if the estimated value entered above is $5,000,001 or higher.

Do you request an expedited CAT review? If you answer "Yes" to this question, you will receive a follow up question that confirms you have read 34 TAC 20.163. A typical expedited review takes 14-20 calendar days.

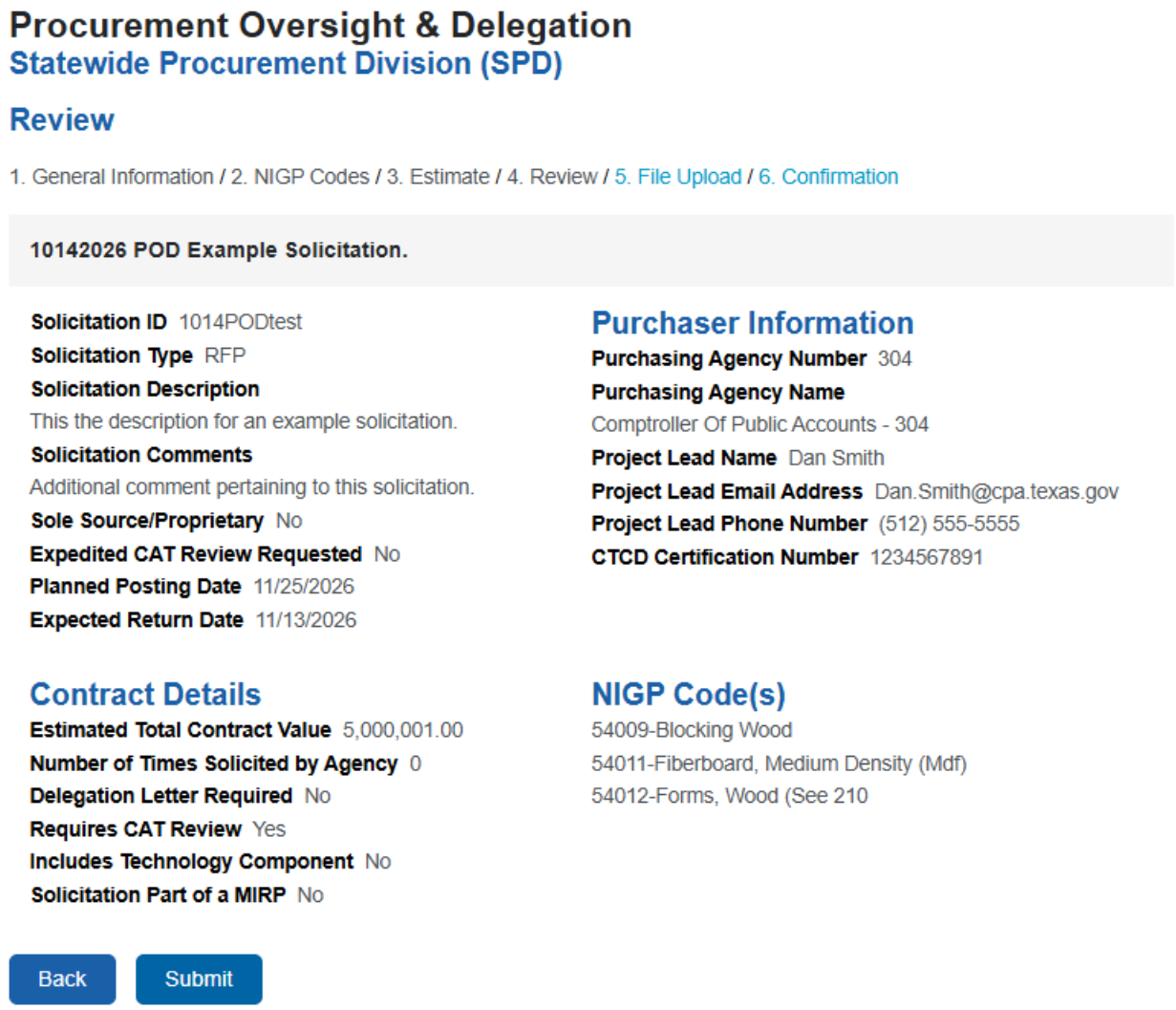
Does this solicitation include a technology component? Is this solicitation part of a Major Information Resource Project (MIRP)? Has this MIRP been approved by the Quality Assurance Team? – Answer these questions accordingly.



At this point, the user is directed to the review screen. Please review all data. This is your last chance to make any edits. Edits are not available from this view; however, users can click **Previous** to go back and make desired changes.

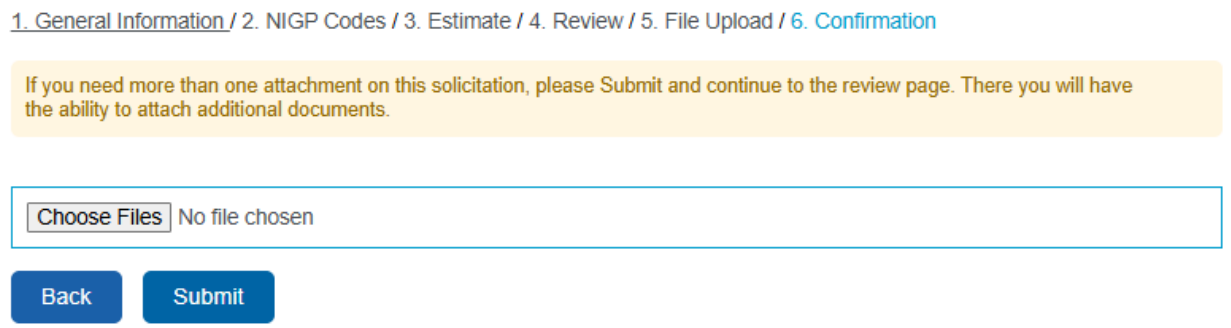
Submitting on this page will save the record and notify the POD/CAT team that there is a new submission.

Do not exit off the page. Your submission is not complete. Submitting on this page will direct you to the attachment upload page.



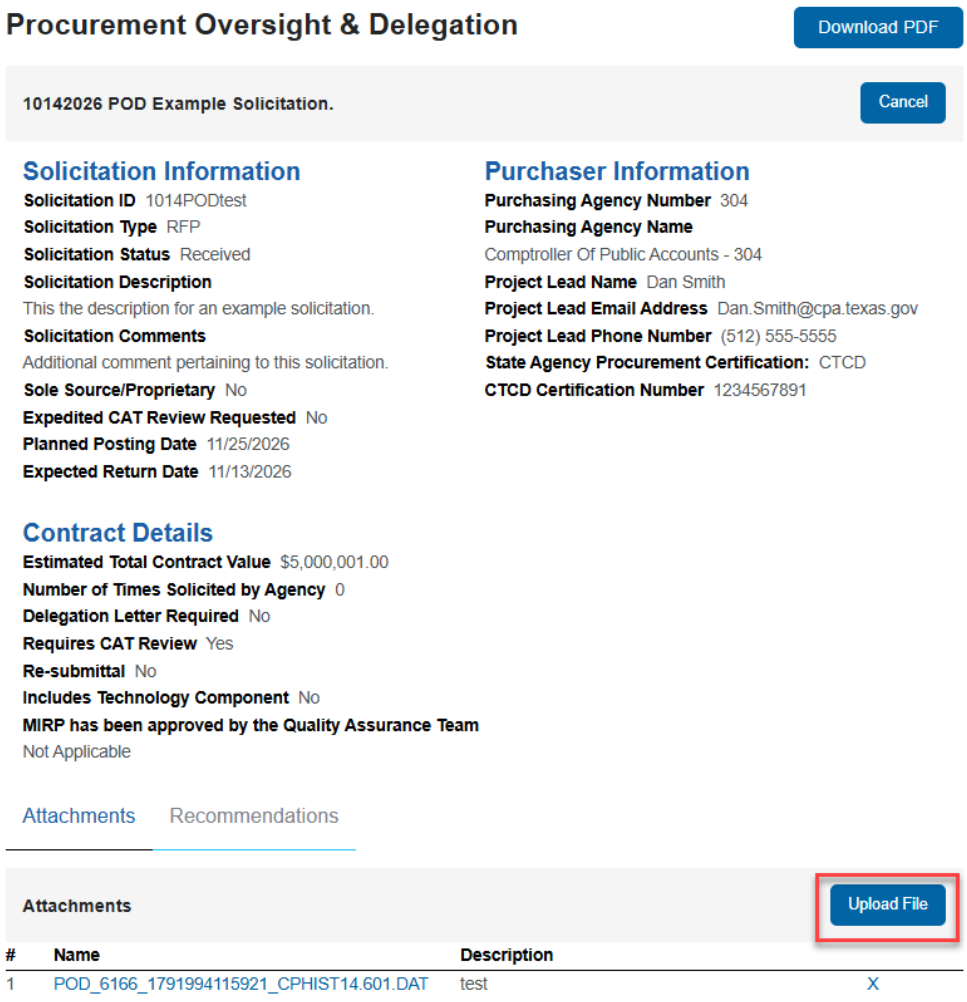
File Upload

To complete a submission, at least one file must be uploaded. To do so, you can select the **Choose Files** button to bring up your file browser and select the file you want to upload or you can drag and drop the file into the field that reads "No file chosen".



After uploading the selected file, you will be required to enter a description of that file. Only one file can be added on this page. Additional files can be uploaded on the next page. Press **Submit** to proceed.

At this point, the submission has now been successfully created. To provide additional files, select the **Upload File** button located in the lower right portion of the screen. You can also download a PDF of the submission on this page.

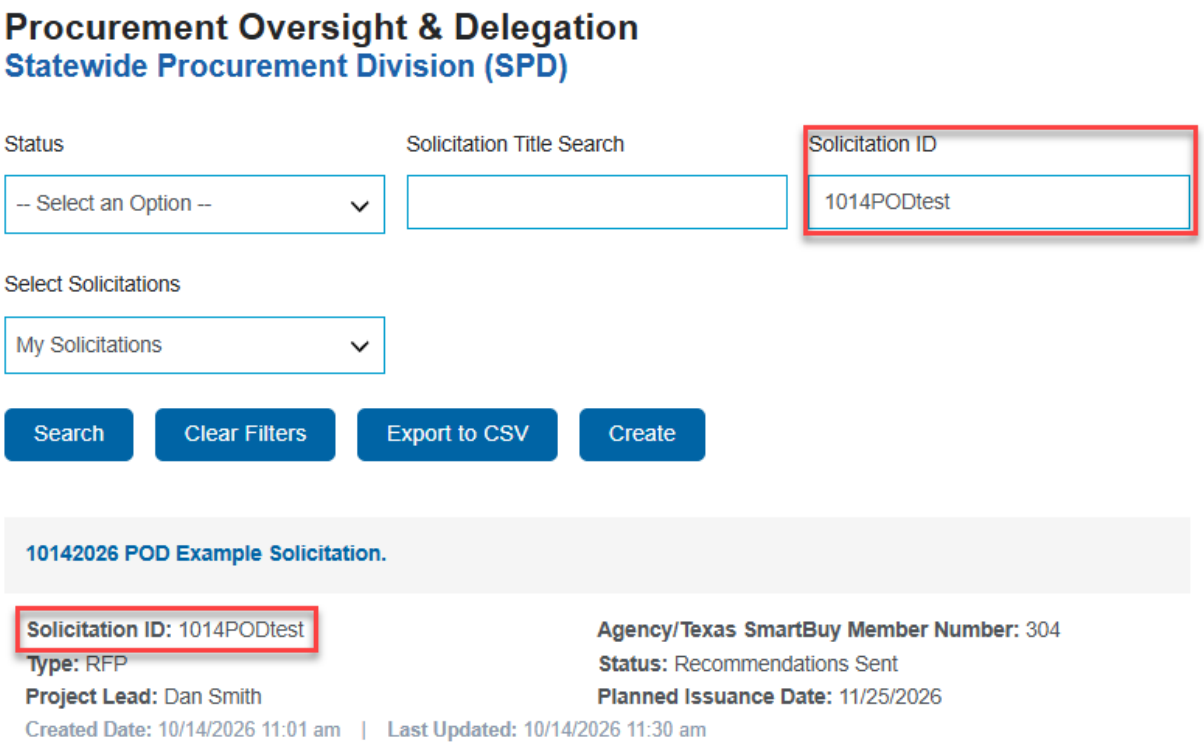


Recommendations

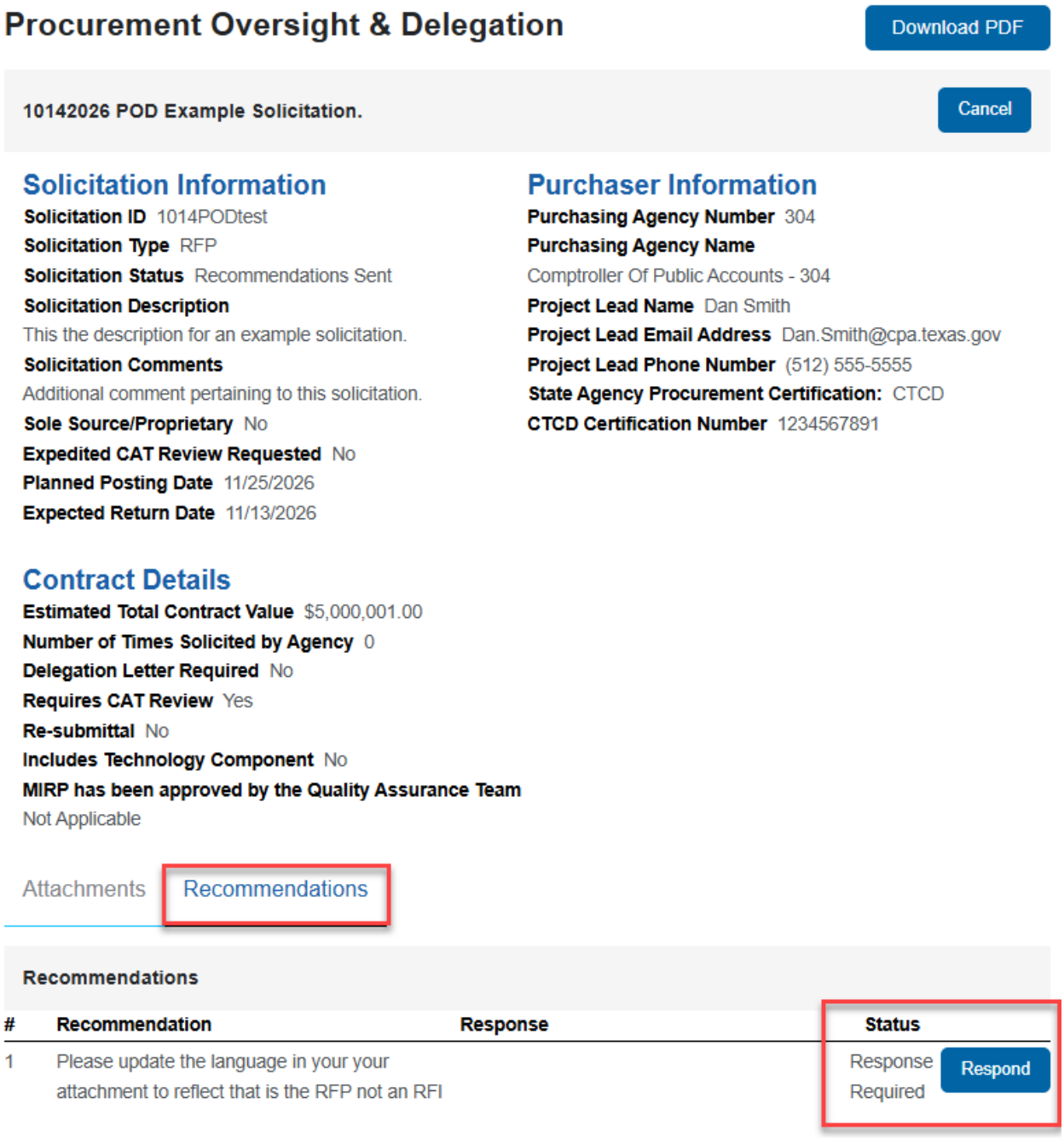
Once POD/CAT has completed the recommendations, you will receive an email notifying you that you must respond to the recommendations.

Login to Texas SmartBuy and navigate to the POD record you created.

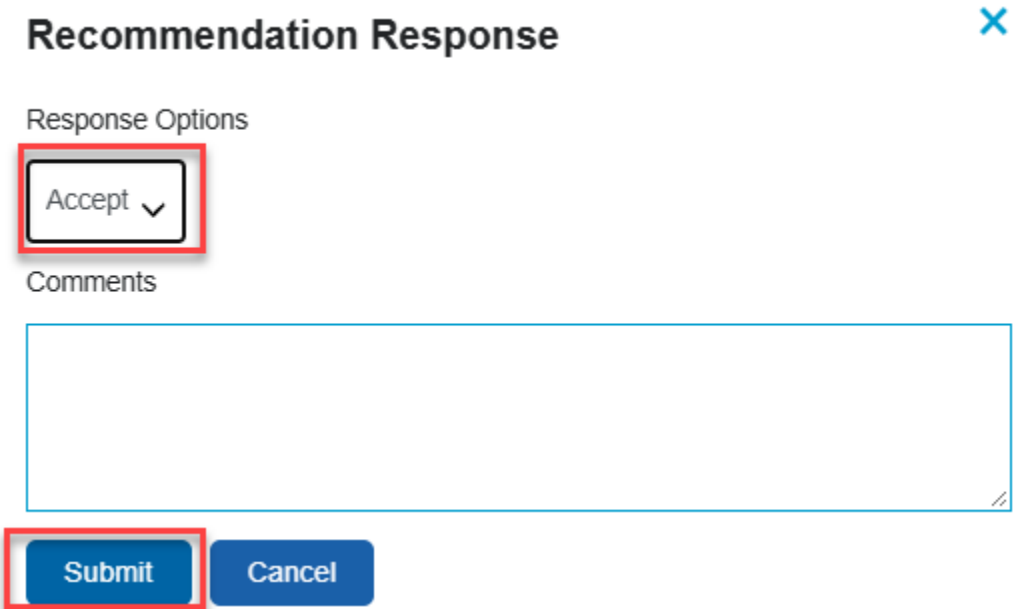
In the POD portal, you can filter by Solicitation ID or Solicitation Title Search to quickly find your POD submission.



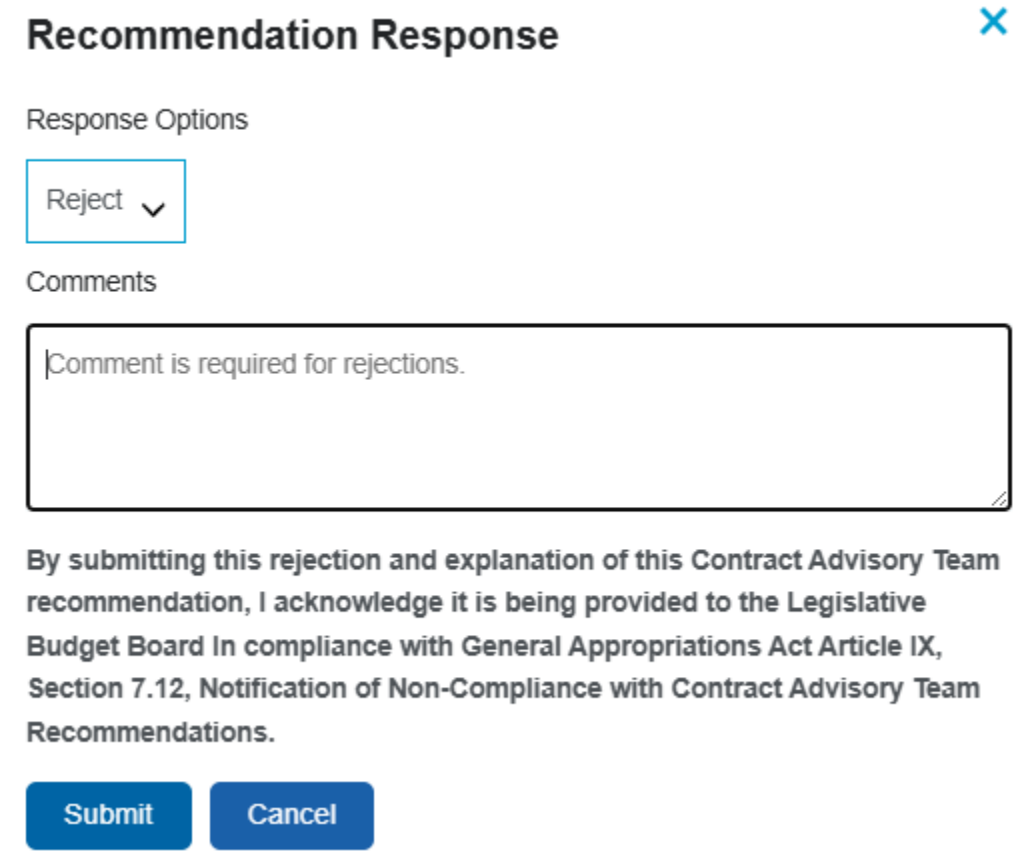
Once you have the record open, navigate to the bottom of the page, and select the **Recommendations** tab. On this tab, you will see the list of recommendations. You must respond to each recommendation. Select the **Respond** button to open a pop-up where you can submit your response.



Accepting a recommendation does not require a comment. Select **Accept** in the drop down and select the **Submit** button.



When rejecting a recommendation, a comment is required. To reject, select **Reject** from the drop down, add a reason for the rejection in the comment field, and press the **Submit** button. If this is a CAT submission there will be a notification by rejecting this recommendation, the Legislative Budget Board will be notified.



Once all recommendations have been responded to, an additional button will appear on both the top and the bottom of the page that reads “Complete Review” pressing this button completes the POD/CAT review process. You must select the **Complete Review** button to receive the Delegation Letter/CAT Review Letter via email.

If you have not received this letter by email, please double check this button has been pressed before contracting the POD team.

If you do need additional assistance, you can contact the POD/CAT team at spd.oversight@cpa.texas.gov.