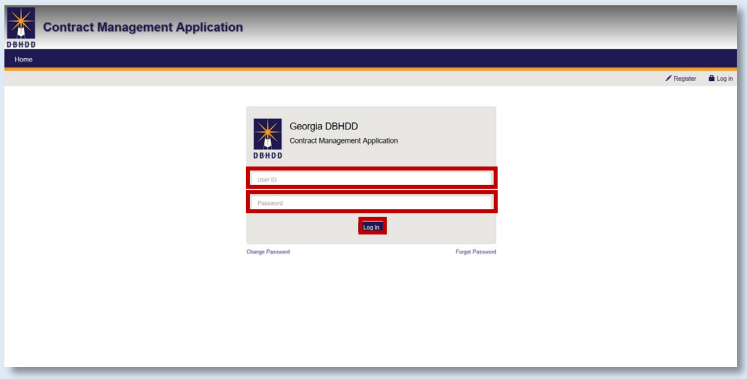
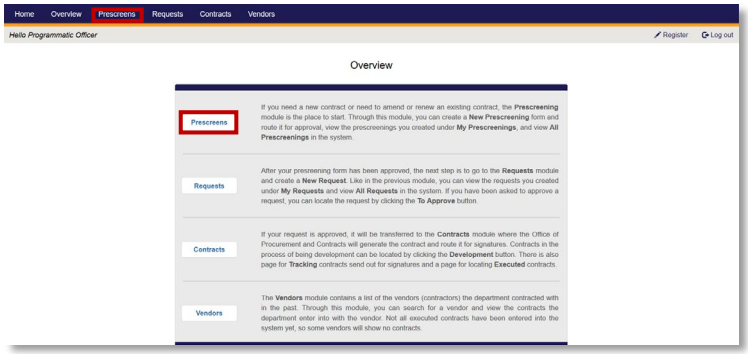
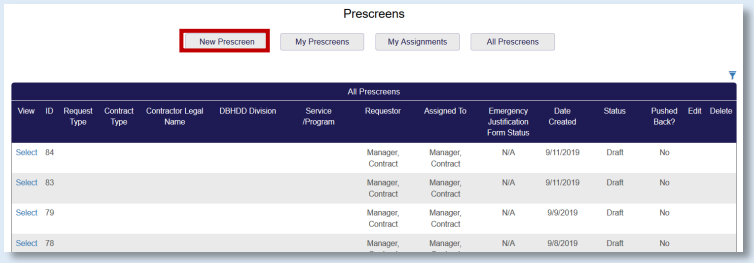
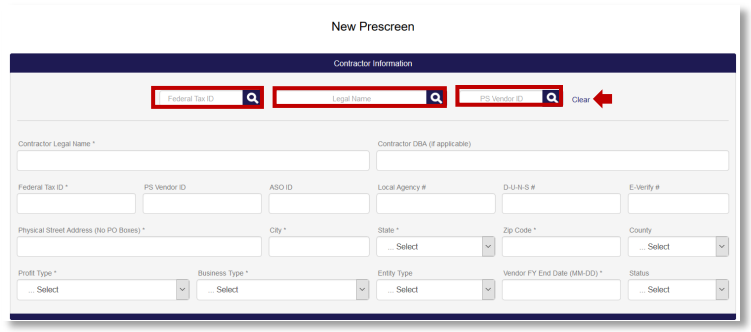
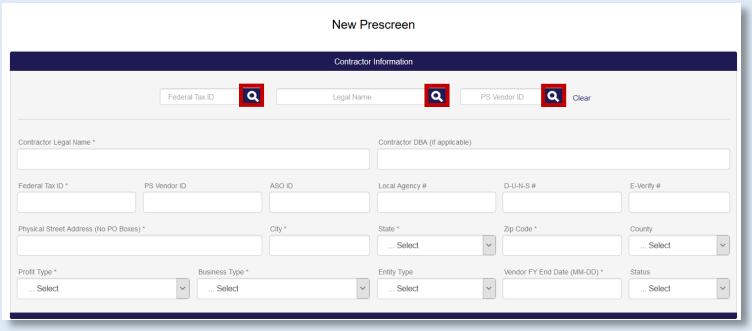
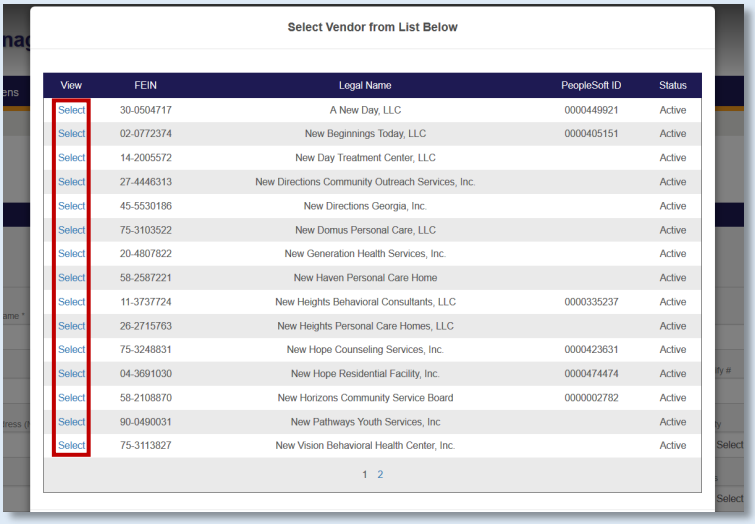
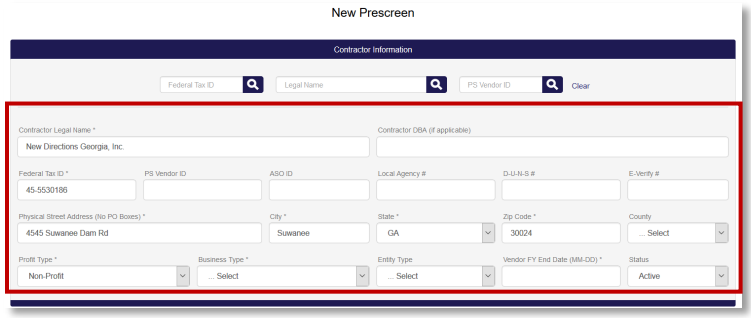
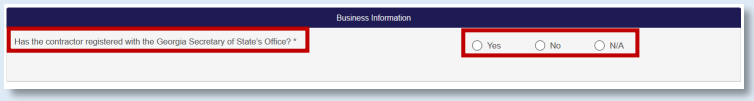
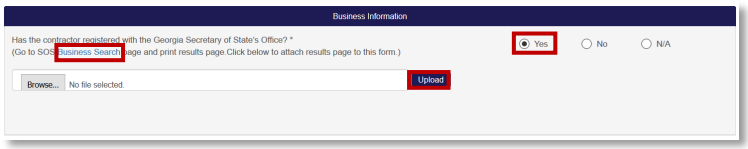
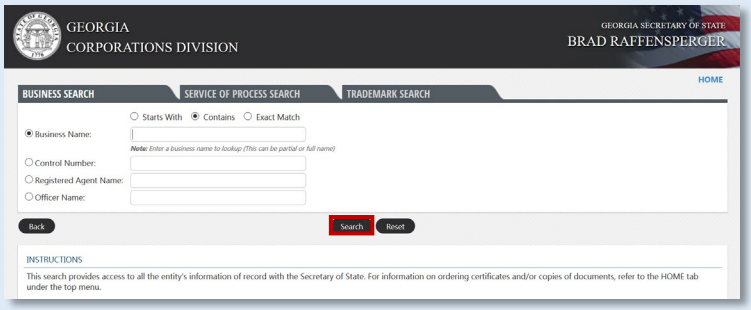
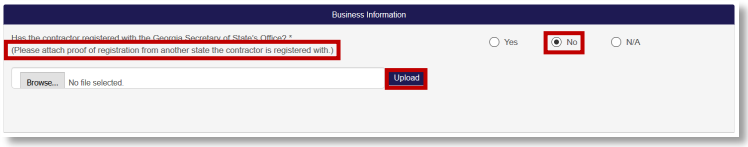
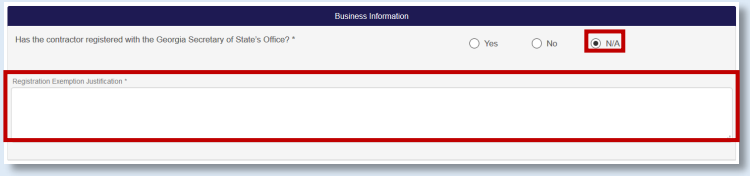
Creating a New Prescreening Request Without an Emergency Justification

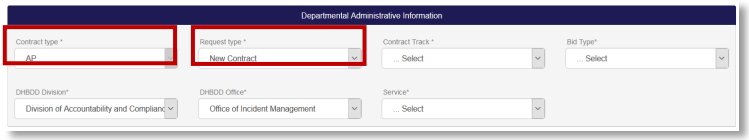
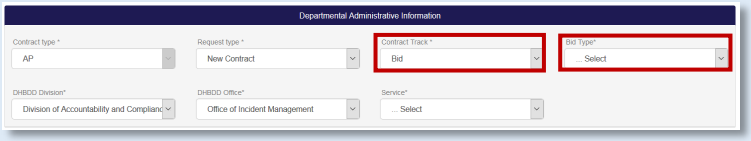
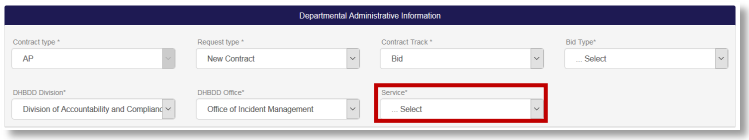
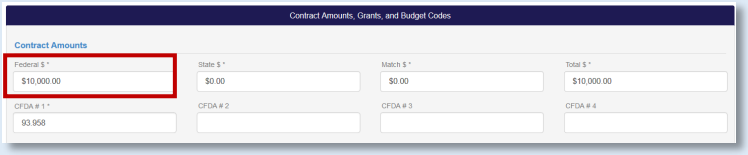
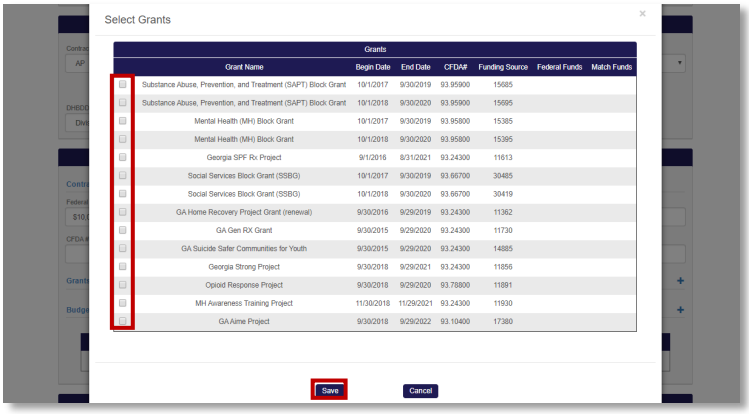
SUMMARY

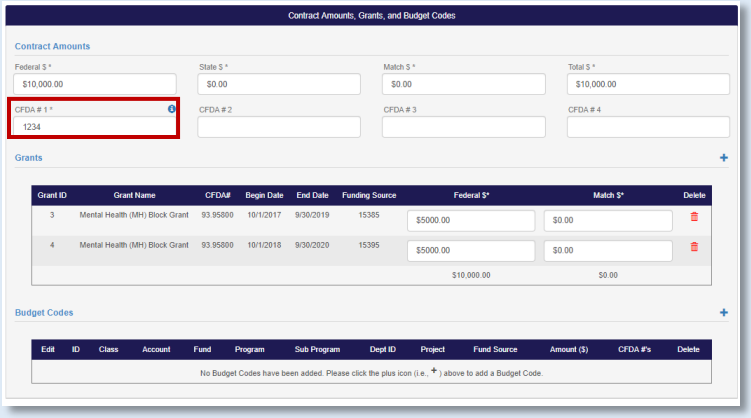
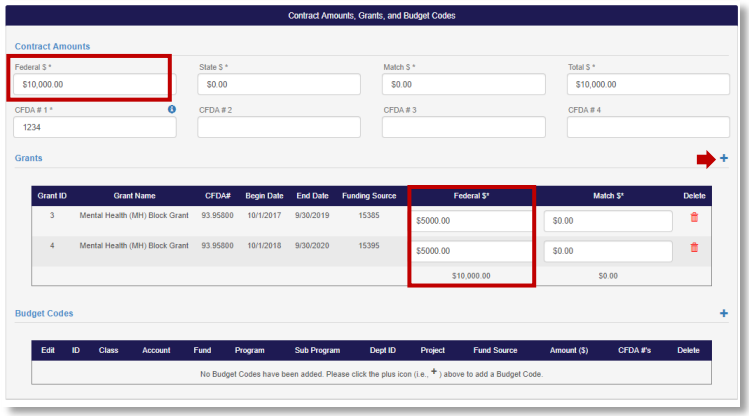
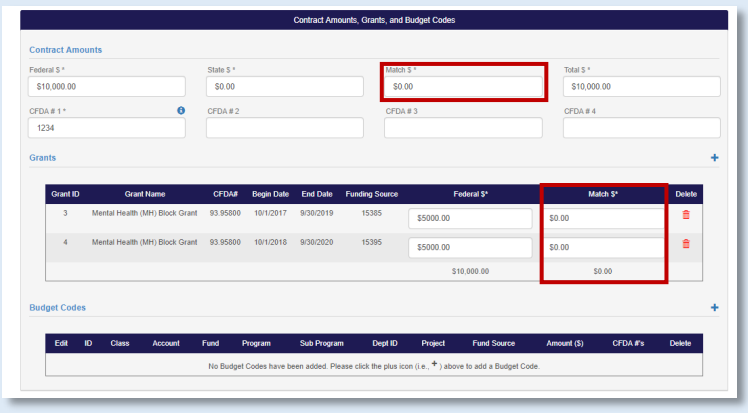
This job aid shows how to create a Prescreen request without an emergency justification.

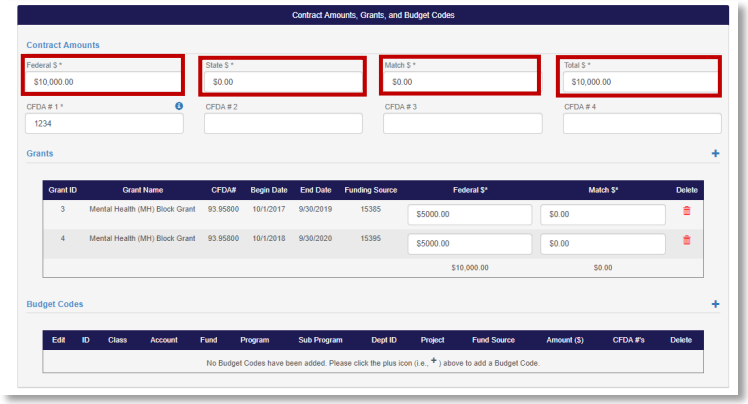
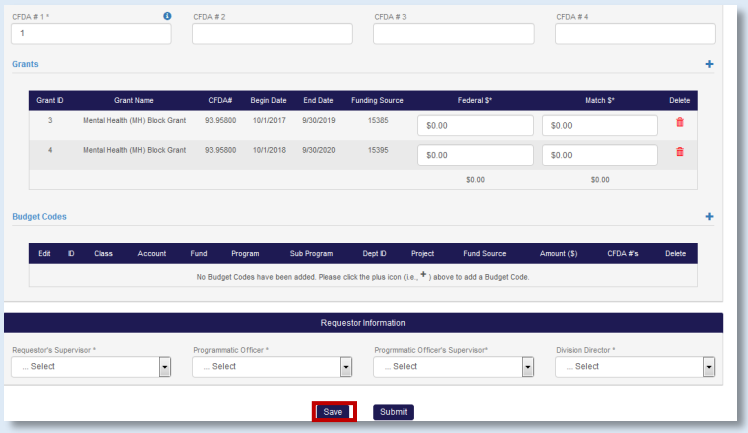
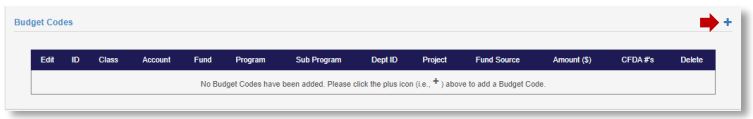
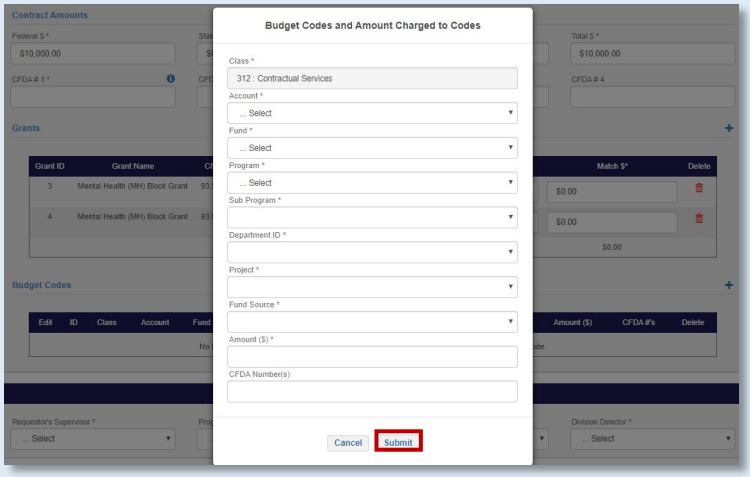
Step	Action	Visual
1	To log in to **Contract Management Application,** enter your **User ID** and **Password.** Select the **Log In** button**.** If the **User ID** and **Password** are entered correctly, the **Overview** page will open.	
2	To access the Prescreens, select the **Prescreens** link at the top of the page, or select the **Prescreens** button in the middle of the page.	
3	Select the **New Prescreen** button. The **New Prescreen** page will open.	

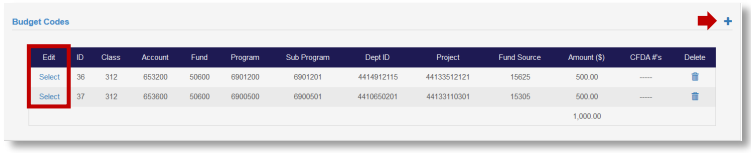
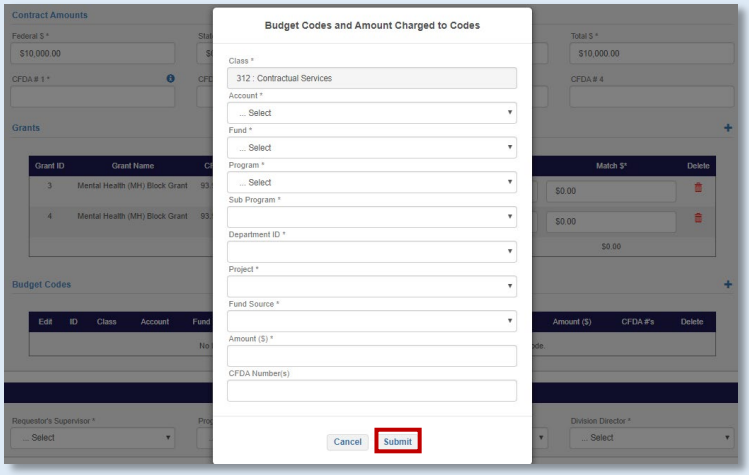
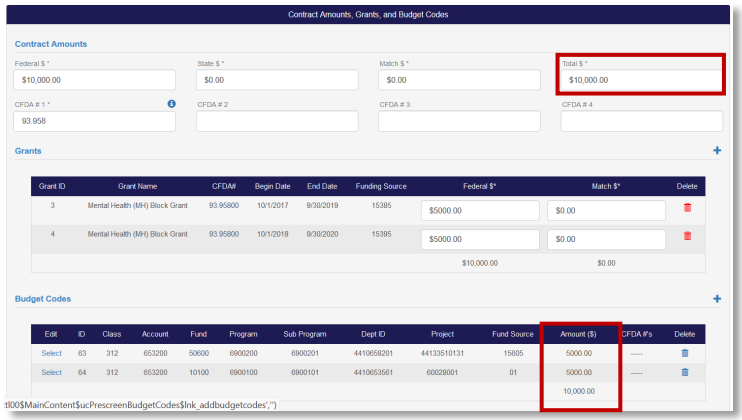
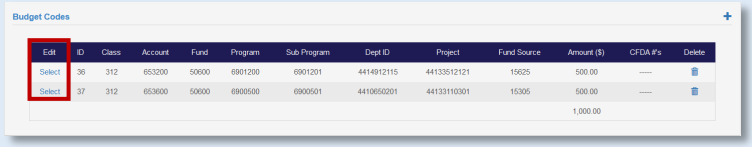
Step	Action	Visual
4	In the **Contractor Information** section, you can search or enter the vendor who is requesting the contract. To search for the vendor, enter the **Federal Tax ID**, **Legal Name,** or **PS Vendor ID** in the search fields. The **Clear** button deletes the entries in the **Federal Tax ID**, **Legal Name,** and **PS Vendor ID** search fields.	
5	Select the **Search** icon. A popup page displays that says **Select Vendor from List Below** with the available vendor options. If the vendor information is in the system, it will display as an option. In the **View** column, select the **Select** link.	 

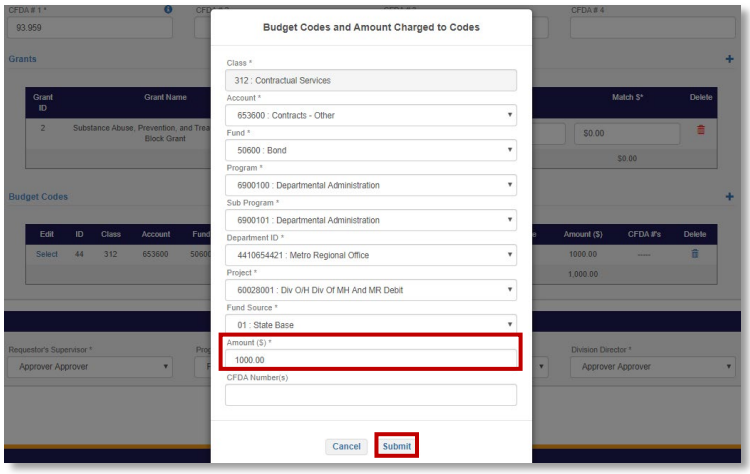
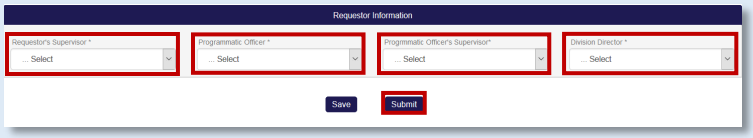
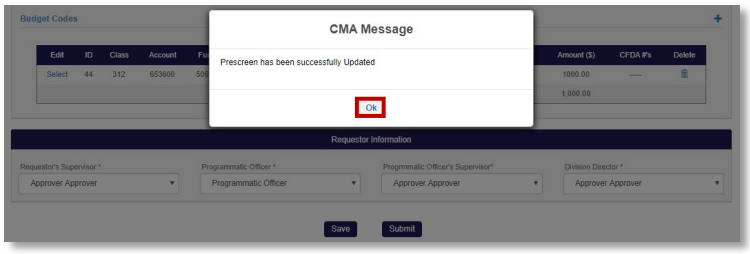
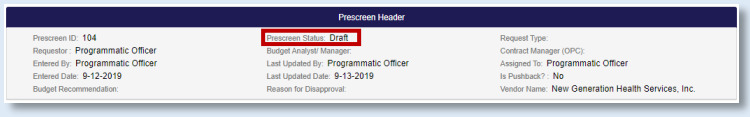
Step	Action	Visual
6	Selecting the vendor from the popup list will auto-populate all available information from the vendor in the mandatory fields. If there is missing information in a mandatory field, you will need to enter it manually. If the vendor is not in the system, manually complete the vendor information fields.	
7	Select **Yes, No,** or **N/A** to the question **"Has the contractor registered with the Georgia Secretary of State's Office?"**	
8	Selecting **Yes** will direct you to the **Go to SOS Business Search** page and the print results page. Select the **Business Search** link. The link opens the form from the **Georgia Corporations Division** to complete.	
9	Select the **Search** button for the results. You will need to select the **Upload** button in the **Business Information** section to attach the results page to this form.	
10	If **No** is selected, a message displays asking you to "**Please attach proof of registration from another state the contractor is registered with."** You will need to select the **Upload** button to attach proof of registration from another state to this form.	
11	Selecting **N/A** will require you provide a **Registration Exemption Justification**.	

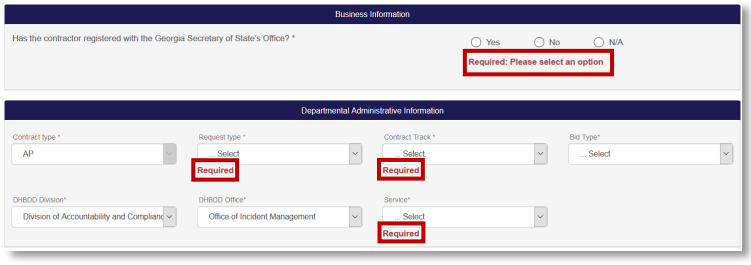
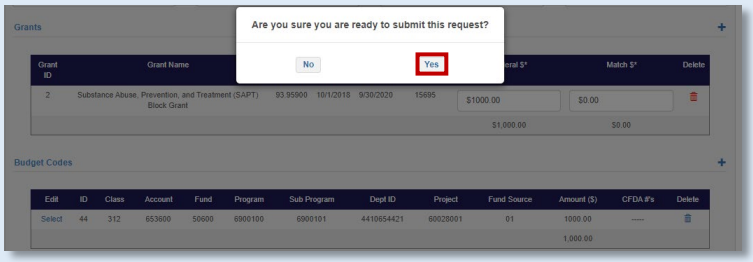
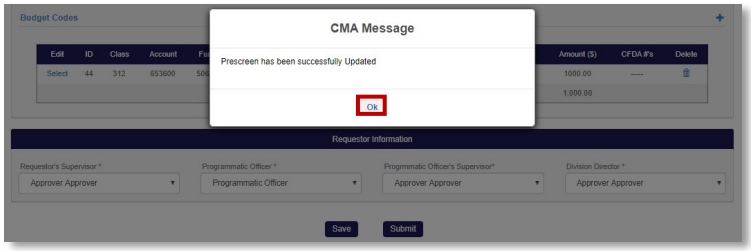
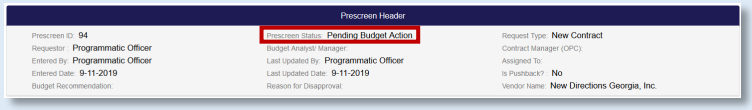
Step	Action	Visual
12	In the **Contract type** field, **AP** is auto-populated because the Prescreen is only applicable to the **AP** contract. In the **Request type** field, there are three options to choose from: **Amendment, New Contract,** or **Renewal.** Since you will be creating a **Prescreen** with the **Contract type** as **AP**, the selection will be **New Contract.**	
13	In the **Contract Track** field, the options are **Bid** or **Non-Bid**. Select **Bid.** The **Bid Type** field displays. Select the type of bid from these options: **RFP, RFQ, Sole Source,** or **SON.**	
14	The **DHBDD Division** and **DHBDD Office** fields within the **Department Administration Information** section will auto-populate with the user's division or office. Select the appropriate option from the **Service** field. There are several options available.	
15	In the **Contract Amounts** subsection, entering an amount greater than zero in the **Federal $** field will prompt the **Grants** popup window to appear.	
16	Select the appropriate grant(s) by selecting the box(es) to the left of the **Grant Name** column. Select **Save**.	

Step	Action	Visual
17	The selected grants and **CFDA #** fields are added to the form. The **Grants** and **Budget Codes** sections are added to the page. Enter the **CFDA** numbers in the **CFDA #** fields. **CFDA # 1** is a mandatory field; **CFDA #s 2, 3,** and **4** are optional. **NOTE:** To obtain additional information about the Catalog of Federal Domestic Assistance (**CFDA**), select the information icon to the right of **CFDA # 1**. The sam.gov website opens to search for information about **CFDA**.	
18	If there are multiple grants in the **Federal $** fields within the **Grants** subsection**,** the total dollar amount for each grant must match the dollar amount in the **Federal $** field within the **Contract Amounts** subsection**.** If you need to add additional grants, select the **Plus sign** at the right of the **Grants** subsection.	
19	The **Match $** amount within the **Contract Amounts** subsection must match the **Match $** field total in the **Grants** subsection.	

Step	Action	Visual
20	The **State $** field is used if there are state amounts applied. The **Total $** field is the total of the **Federal $** field, **State $** field, and **Match $** field amounts.	
21	Select **Save**.	
22	To add budget codes, select the **Plus sign** to the right of the **Budget Codes** section. A popup window opens for **Budget Codes and Amount Charged to Codes**.	
23	Select from the following required fields: **Class, Account, Fund, Program, Sub Program, Department ID, Project, Fund Source, and Amount ($)**. The **Amount ($)** field information must be entered manually. The **CFDA Number(s) field** is not mandatory and must be entered manually. Select the **Submit** button to auto-populate all the information into the **Budget Codes** section.	

Step	Action	Visual
24	If there are multiple grants, additional budget codes must be entered. To enter another budget code, select the **Plus sign** to the right of the **Budget Codes** section. The **Budget Codes and Amount Charged to Codes** popup window will appear.	
25	Complete all required fields and select the **Submit** button.	
26	To confirm the **Budget Codes Amount ($)** total for multiple grants, match the **Totals $** amount in the **Contracts Amounts** section.	
27	Select the **Select** link in the **Edit** column of the **Budget Codes** section. The **Budget Codes** and **Amount Charged to Codes** popup window will appear.	

Step	Action	Visual
28	In the **Budget Codes and Amount Charged to Codes** section, adjust the **Amount ($)** field for each grant, if applicable. If any adjustments were made, select **Submit**. Select **Cancel** to close the **Budget Codes and Amount Charged to Codes** edit window without saving the adjustments.	
29	Complete all required fields in the **Requestor Information** section. In the **Requestor's Supervisor** field**,** you will need to select the person approving the information. In the **Programmatic Officer** field, select the **Programmatic Officer.** In the **Programmatic Officer's Supervisor** field, select the **Programmatic Officer's Supervisor.** In the **Division Director** field**,** select the **Division Director.** Select the **Submit** button. **NOTE:** Select the **Save** button to save the Prescreen as a **Draft.**	
30	The **CMA Message** appears indicating **that the "Prescreen has been successfully Updated."** Select the **Ok** button.	
31	In the **Prescreen Header** section, the **Prescreen Status** field shows as a **Draft**.	

Step	Action	Visual
32	If you select the **Submit** button and a "**Required"** or "**Required: Please select an option"** error message appears in red, this indicates there are mandatory fields that must be completed. Complete all required fields before re-submitting.	
33	Once all required fields are completed, select the **Submit** button. The "**Are you sure you are ready to submit this request?**" message appears. Select **Yes.**	
34	The **CMA Message** will appear indicating **that the "Prescreen has been successfully Updated."** Select the **Ok** button.	
35	The **Prescreen Status** field displays **Pending Budget Action**. **NOTE:** The **Prescreen Header** is on all Prescreen forms and displays all the information that pertains to the form.