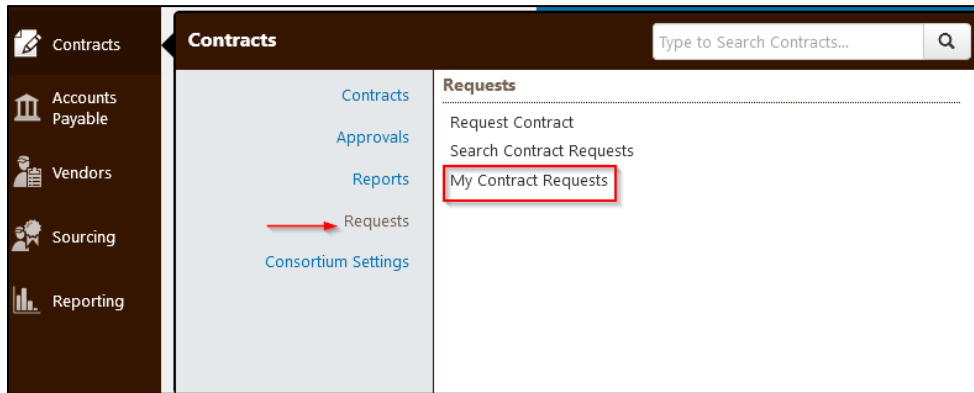


# Creating and Submitting a Sole Source Request Form in eMACS

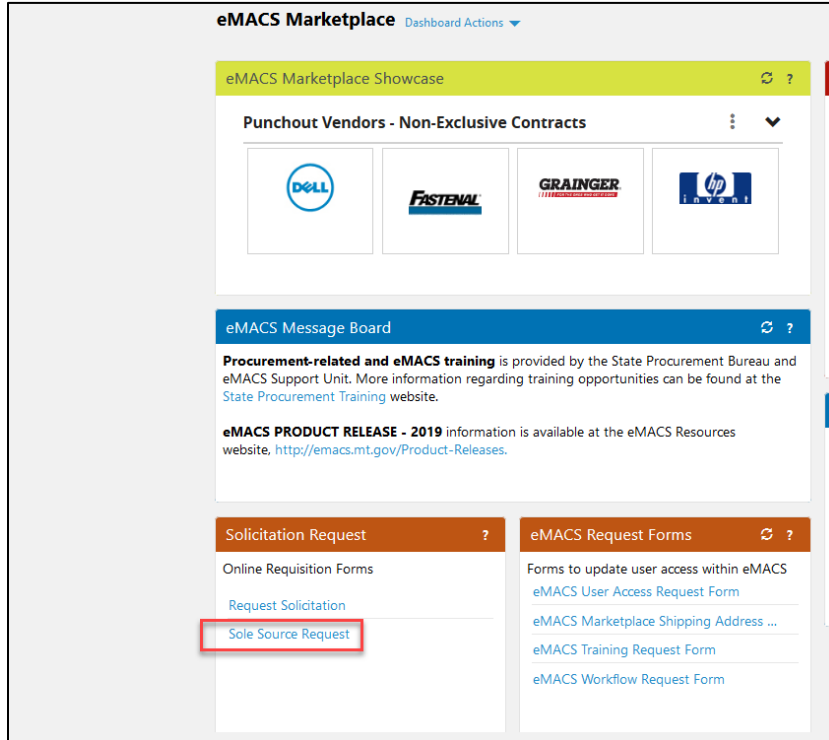
The State Procurement Bureau has a new Sole Source Request form separate from the online requisition form. The new form will aid in reporting requirements and allow the creation of a contract record from an approved sole source.

Ensure that you have a **Requisitioner** role, it is required for users to submit sourcing event requests. See Page 8 to see how to determine what role you are assigned.

1. Access the Sole Source Request Form in eMACS by:
  - a. First, navigate to Contracts > Requests > My Request Contract; or



- b. by navigating the Sole Source Request on the eMACS home page.



2. Enter a Contract Request Name (name of Sole Source. The Contract Request Template field will auto-populate. Once populated click Submit.

**Create Contract Request**

Contract Request Name \*

Select a Contract Request Template \*  
Sole Source Procurement Justification

\* Required

3. Review the Instructions section. Any updates to the form will be posted in this section. Once you've reviewed the information, click Next.

**Instructions** [Print Preview](#) [Choose Other Version](#) [Template Actions](#) [History](#) [?](#)

Please complete this form in its entirety to request a sole source contract. Section 18-4-306, MCA, allows a contract to be awarded for a supply or service item without competition under certain circumstances. The required item must be available only from a single supplier. "Sole Source" is distinguishable from "Sole Brand" in that only one supplier is available to provide the supply or service. **If you are requesting a sole brand item available from multiple suppliers, a sole brand justification must be completed and submitted through the eRequisition form in eMACS, not this form. This form is for Sole Source requests only.**

Circumstances which could necessitate a sole source procurement are:

- (1) the compatibility of current services or equipment, accessories, or replacement parts;
- (2) there is no existent equivalent product; or
- (3) only one source is acceptable or suitable for the supply or service item.

The determination as to whether a procurement shall be made as a sole source shall be made by the State Procurement Bureau (SPB), unless specifically authorized in the agency delegation agreement (ARM 2.5.604). A request by a state agency to the SPB must be submitted through this form and must include a signed and dated quote from the vendor.

Sole source procedures do not apply if the item is under \$5,000. Additionally, the following items do not require sole source justification (ARM 2.5.604):

- (1) professional licenses;
- (2) dues to associations;
- (3) renewal of software license agreements;
- (4) purchase or renewal of maintenance agreements for software or hardware; and
- (5) publications available only from a single supplier

4. In the Details section, edit the Contract Request Name if a Sole Source is applicable.

**Details** [Print Request](#) [History](#) [?](#)

Contract Request Name \*

Template Sole Source Procurement Justification

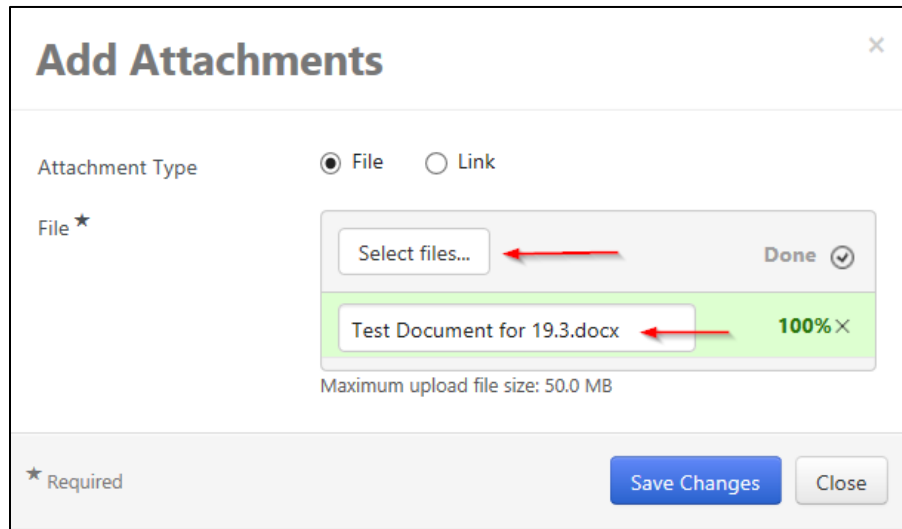
Contract Type Sole Source

Description This template will be used to submit a Sole Source request.

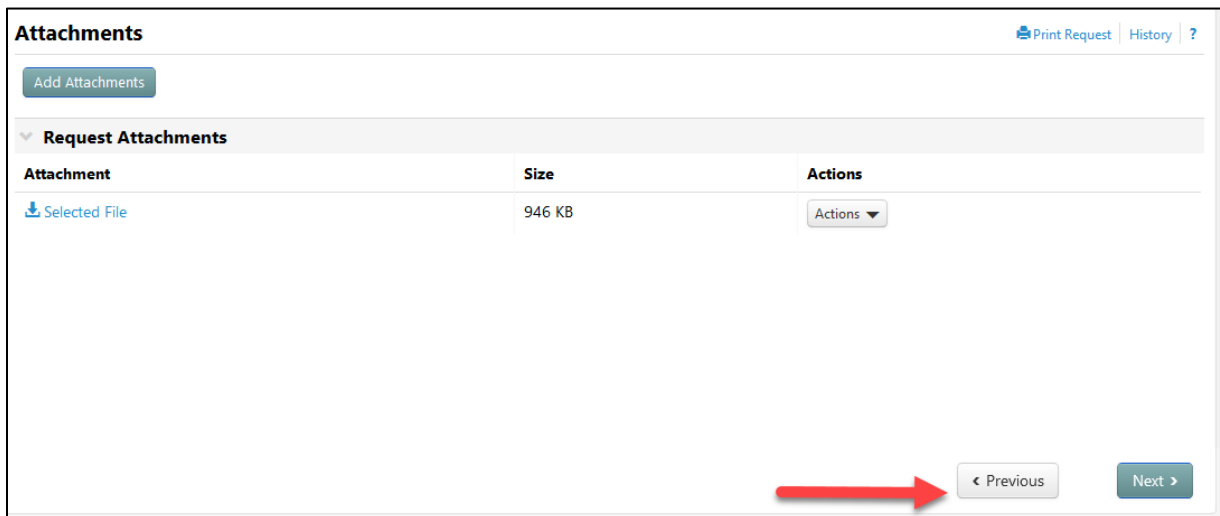
5. Select Add Attachment, if necessary. Examples of attachments may include document files required by questions in the Requisition form or additional answers to questions.



- a. Next, the Add Attachment window will appear, click Select files.  
b. After adding the designated file, click Save Changes.



- c. After attachments have been added, either click Previous to return to the prior page or Next to move to the next step.



6. The next step is to complete the questions section. The questions section may require more characters than what is allowed. If that is the case, you may add additional documents under the Attachment section.

Questions with a **★** next to it requires a response or the form will not be submitted. The questions that have **★** contains behind the scenes workflow(approvals), as listed below:



1. Select Agency Name – Form needs the approval of the Agency Procurement Officer associated with the agency name that is selected.
2. Select agency staff approving this sole source request – Listed below are the response options and the approval for each selection:
  - a. Agency Director – Will approve Sole Source in eMACS -The agency director will receive an email notification that will require a login to eMACS to manually approve the sole source request.
  - b. Agency has obtained director pre-approval and will upload document – An additional question will appear and request a file upload containing approval information from agency director. The form will then skip this workflow step.
  - c. Agency has approval exception for this Sole Source Request – An additional question will appear to request exception details for this request. The form will then skip this step.
3. Total Contract Value – If the value entered here is over your delegated authority and needs approval the form will stop here for approval.
  - a. After completing the Questions section, click Save Progress, then Previous or Next to move forward.

▼ **Shipping/Billing Information**


Is shipping address required for this sole source request? ★

Yes  No

Is the billing address the same as the shipping address? ★

Yes  No

★ Required

 < Previous Save Progress Next >

7. In the Review and Complete section, all required fields must be completed before selecting Complete Request.

**Review and Complete** Print Request | History | ?

✓ Required fields complete

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

★ Required

< Previous **Complete Request**

8. The Discussion section is optional. This section can be used to start a communication thread regarding information about the Sole Source Request. This section can be used to store information that only the creator of the form can see. The workflow approver can use this section to send a communication to the creator of the form, while the form is in workflow.

To start a communication thread, click Start New Thread.

**Discussion** Print Request | History | ?

**Start New Thread**

*There are no message threads in for this request.*

- a. Enter information in the required fields, add any attachments if necessary, then select Post Message.

**Post a New Message** [X]

Subject ★

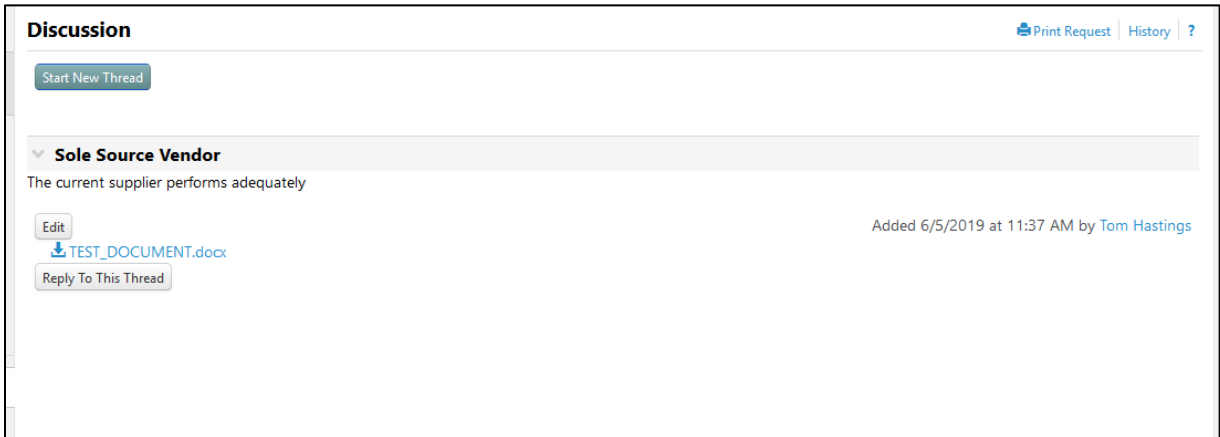
Message ★

4960 characters remaining

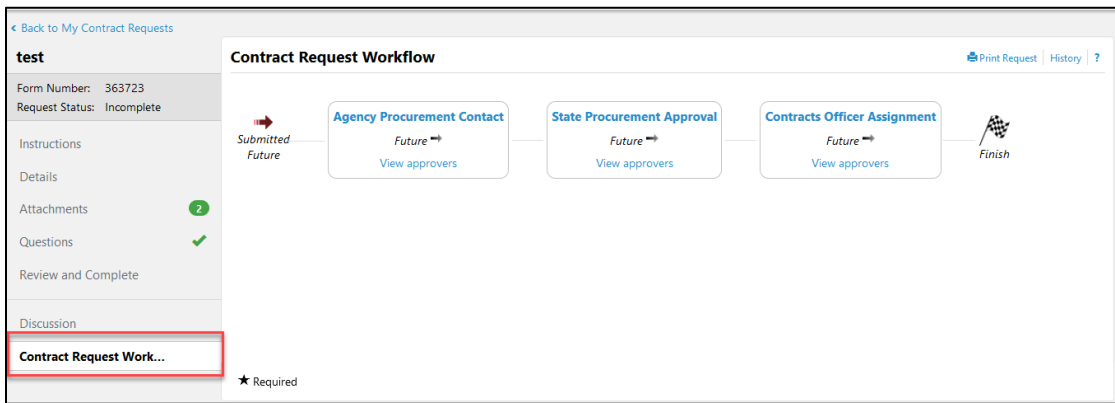
Add Attachments

★ Required **Post Message** Close

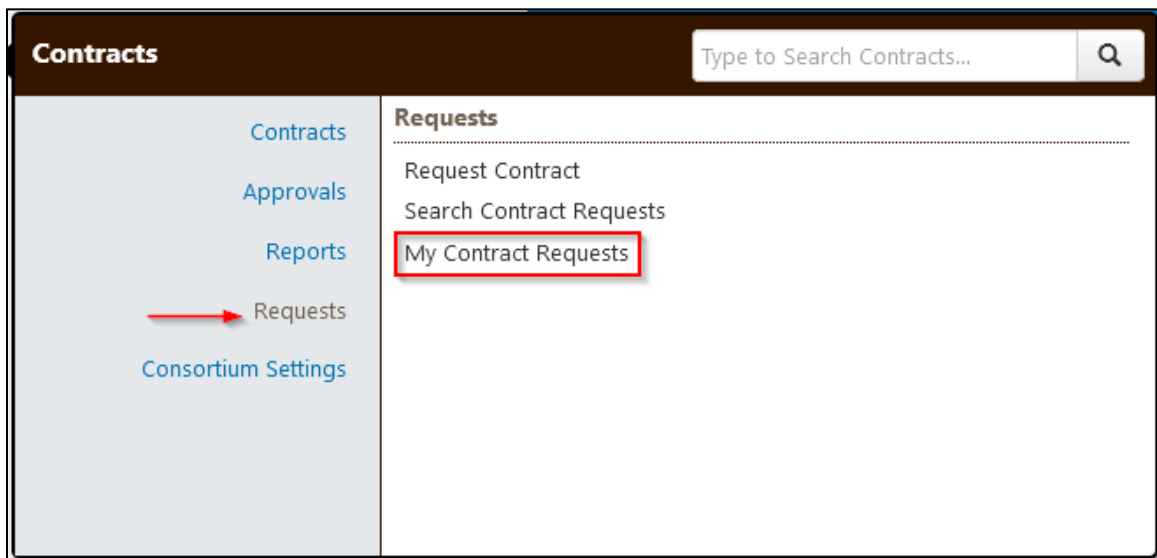
b. The information entered is stored in this Discussion section



9. Appropriate review and approvals are obtained once the Sole Source Request form has been submitted.



10. To view submitted requests, navigate to Contracts > Requests > My Contract Requests.



11. My Contract Requests option will display by choosing one or all filtering options.

**My Contract Requests** ?

Filter Contract Requests Create New Contract Request

Request Status \*

Approved

Incomplete

Rejected

Returned

Under Review

Completed

Apply

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
test	Sole Source Procurement Justification	Tom Hastings	Approved	-	-	6/5/2019 1:08 PM	6/5/2019 10:59 AM	Actions

a. The results of the search criteria will display a record of any contract request records. A New Contract Request can also be created from this page.

Contracts > Requests > My Contract Requests > My Contract Requests

**My Contract Requests** ?

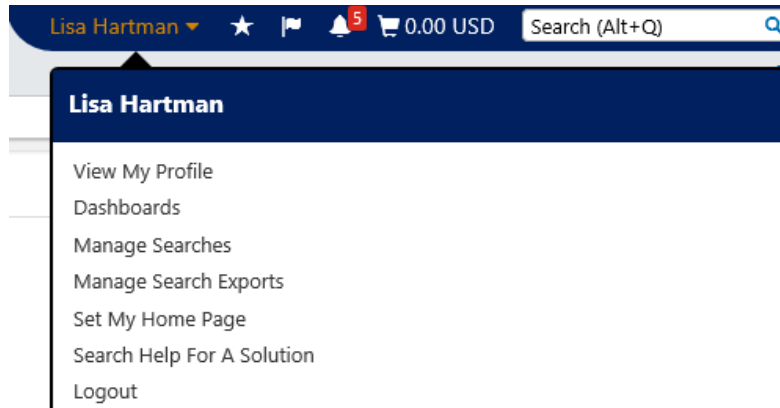
Filter Contract Requests Create New Contract Request

< > Page 1 of 2 1-10 of 12 Results 10 Per Page

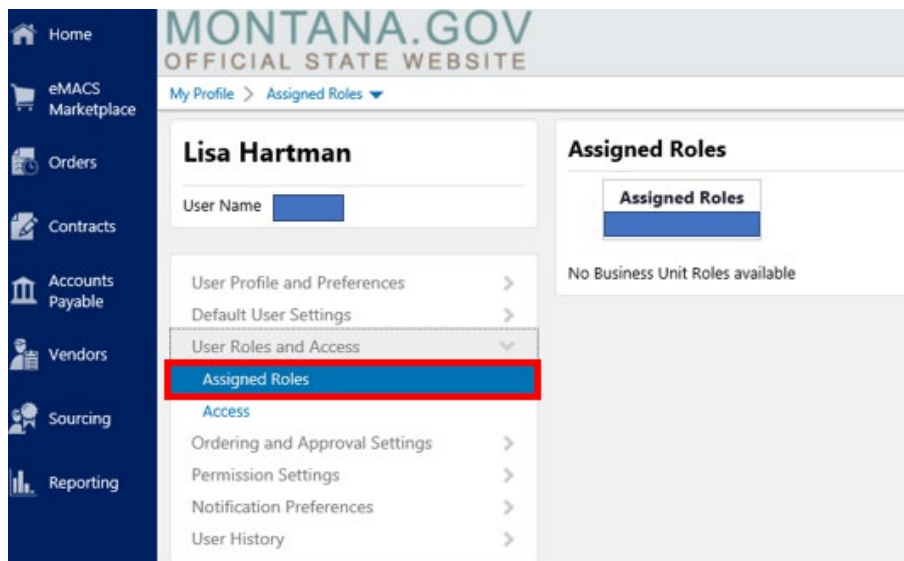
Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
<a href="#">Sole Source Renewal Process</a>	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	6/3/2019 1:59 PM	6/3/2019 1:34 PM	Actions
<a href="#">Updated Version</a>	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	8/8/2019 8:41 AM	8/8/2019 8:28 AM	Actions
test	Sole Source Procurement Justification	(admin)Tom Hastings	Returned	-	-	8/20/2019 6:38 AM	8/12/2019 7:23 AM	Actions
test	TestTemplate	(admin)Tom Hastings	Completed	-	-	3/5/2019 11:44 AM	3/5/2019 11:40 AM	Actions
test	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	3/21/2019 2:22 PM	3/21/2019 2:15 PM	Actions
TEST	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	4/15/2019 7:43 PM	4/15/2019 7:33 PM	Actions
test	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	4/18/2019 12:51 PM	4/18/2019 12:47 PM	Actions

## How to find your user role

1. After logging into eMACS, on the top right-hand corner of the screen. Select the drop-down menu on your name. Then select View My Profile.



2. Under View My Profile, go to User Roles and Access → Assigned Roles



3. You will see what roles are assigned to you. If there is nothing listed, please contact eMACS help desk for assistance.