Contract Tracking System
Goods & Services (Only)

Step-by-Step Guide…

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If You Need Assistance...

If at any point in the process you need assistance, become unsure of what to do next, or have any questions, please contact:

Todd McGonigle, Program Manager
Equal Opportunity Division
30 E. Broad, 18th Floor
Columbus, OH 43215
614-466-8380
todd.mcgonigle@das.state.oh.us (email)

A Word About the EDGE Program

As its name suggests, the State of Ohio's EDGE program provides an EDGE to small businesses by **E**ncouraging **D**iversity**, G**rowth and **E**quity in public contracting. EDGE is an assistance program for economically and socially disadvantaged business enterprises.

The State of Ohio developed the program because it is committed to making all state contracts, services, benefits and opportunities available without discriminating on the basis of race, color, religion, sex, national origin, disability, age or ancestry.

The state recognizes the need to encourage, nurture and support the growth of economically and socially underutilized businesses to foster their development and increase the number of qualified competitors in the marketplace.

EDGE establishes goals for state agencies, boards and commissions in awarding contracts to certified EDGE eligible businesses. EDGE applies to procurements of supplies and services, professional services, information technology services, construction and architectural and engineering services.

All state agencies are required to submit contract information in accordance with O.A.C. 123:2-16-13.

How to Obtain a Log-on Password

Steps:

1. Send an email to Todd McGonigle (todd.mcgonigle@das.state.oh.us). Include in the email the following information: first & last name, email address, agency name, person authorizing log-on access.

2. After submitting password request, an email letter will be sent to the email address submitted with the request within 24 hours. The email will include: sign-on name, password, and links to both the test/training database and the production database.

3. You are now authorized to enter data into CTS.

QUICK TIPS

1. Request a "User Name" and "Password" at least 24 hours in advance of need.
2. "User Name" is always the first and last name.
3. "User Name" is NOT case sensitive.
4. "Password" IS case sensitive.

How to Log-on to CTS

(Log-on Screen)

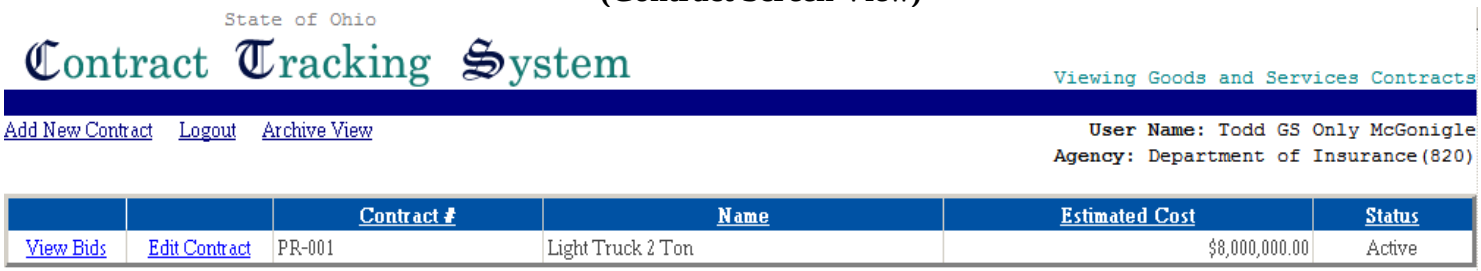
Steps

1. Enter assigned user name into the "User Name" field.
2. Enter assigned password into the "Password" field.
3. Click on the "Log In" button.

QUICK TIPS

1. Before logging-on you must request a user name and password from the Equal Opportunity Division. Refer to "How to Obtain a Log-on Password" instructions.
2. Selecting the "Remember me next time" box will input your information on next log-on.
3. Forgot Password? Click on "Forgot Password?" button. A pop-up box will appear on the screen. Enter your user name and select "Submit." A new password will be sent via email immediately.

(Contract Screen View)



Note: When logging in a view of all contracts with a status of "Active" is displayed. Selection options are "Add New Contract", Logout", Archive View, 'View Bids", "Edit Contract."

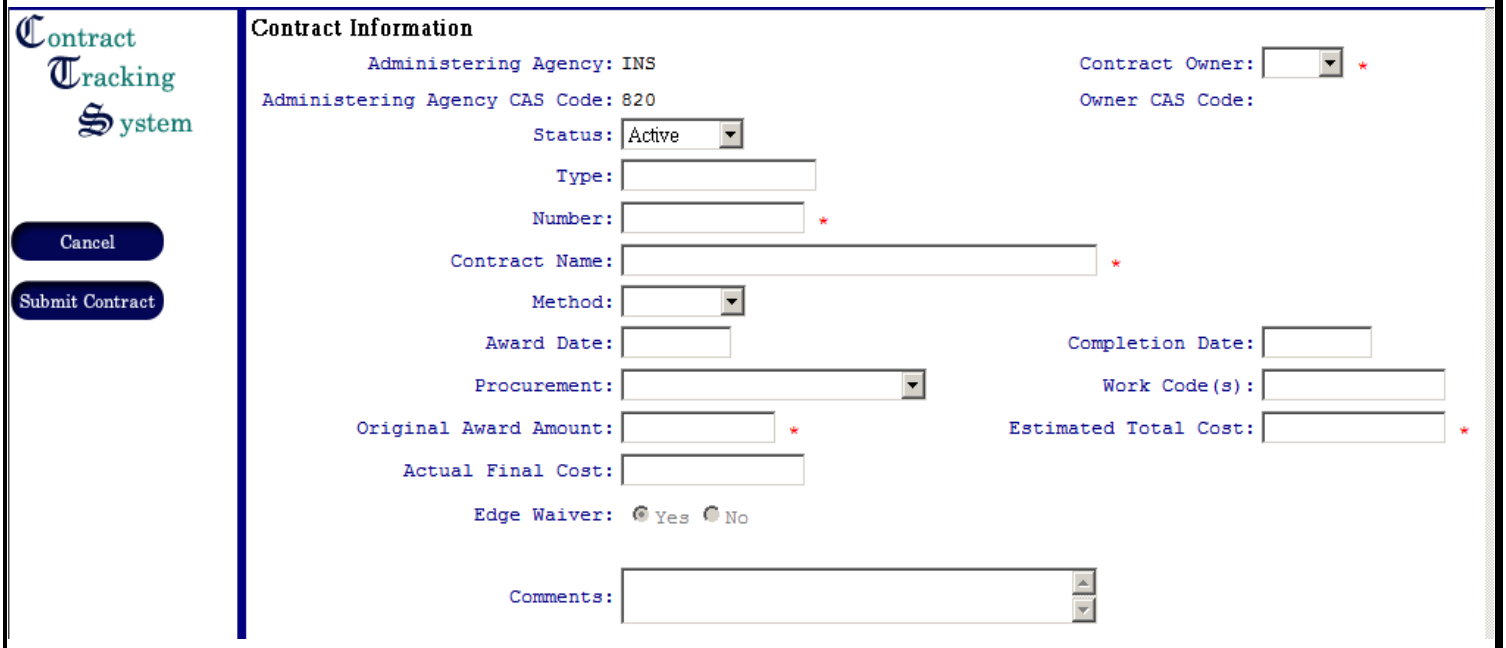
Steps:

1. Select "Add a New Contract."

QUICK TIPS

1. If no contracts have been entered, "There are currently no contracts on file for you to view at this time." Message will be displayed.
2. If contacts have been entered, you may edit the "Contracts", and "Bids" with a status of "Active."
3. The Contract Screen displays a quick view of "Active" contracts with the following table headers: Contact #, Name, Estimated Cost, and Status.

(Contract Enter Screen)



Steps:

2. Enter known data:

- **Contractor Owner –** Enter the CAS for your agency.
- **Status –** Enter status Active, Completed, or Void.
- **Type –** Select type of contract. Note: Dropdown box will appear of known types based on your typing.
- **Number** – Enter the Administrating Agency's "Contract Number". This number must be a unique number. "Number" can be a combination of alpha and/or numeric characters.
- **Contract Name** – Enter name.
- **Method** – Select method type used to bid contract.
- **Award Date** – Enter the date contract was awarded.
- **Completion Date –** Enter the completion date.
- **Procurement** – Select the category of contract.
- **Work Code(s)** – Leave blank.
- **Original Award Amount** – Enter award amount.
- **Estimated Total Cost** – Enter total cost.
- **Actual Final Cost** – Enter final value of the contract.
- **EDGE Wavier** – Defaults to "Yes."
- **Comments** – Enter any comments. Records of all comments are retained and available for review by anyone with proper access.
- Click on "Submit Contract" to save or "Cancel" to disregard the data.

QUICK TIPS

1. All fields with a "RED" asterisk are **REQUIRED** fields.
2. All date fields and dollar fields are preformatted. If data is entered incorrectly, an error message will be displayed. If possible, field formatting will attempt to correct the entered data's format.
3. "EDGE Wavier" field is defaulted to "Yes" as a wavier is not required for Goods & Services Contracts.

(Bid Screen View)

State of Ohio

Contract Tracking System

Viewing Goods and Services Contracts

Add New Contract Logout Archive View

User Name: Todd GS Only McGonigle
Agency: Department of Insurance (820)

		Contract #	Name	Estimated Cost	Status
View Bids	Edit Contract	PR-001	Light Truck 2 Ton	$8,000,000.00	Active

Bid View for:

Contract Number: PR-001

Contract Name: Light Truck 2 Ton

Add New Bid
Add New Company

		Bid ID	FTID #	Company Name	Awardee	Bid Amount	Edge Status	COC Date
Company Detail	Edit Bid	6237	111111111	Todds Construction	☐	$7,000,000.00	N/A	01/01/1900

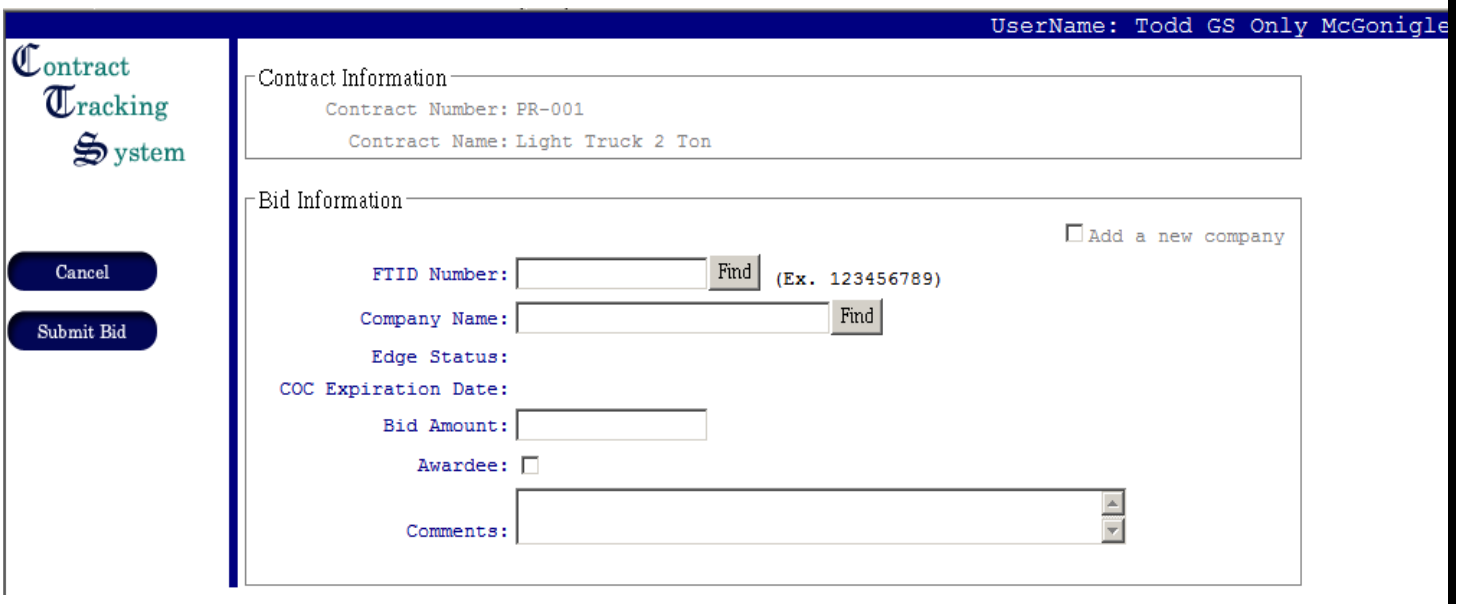
Hide Bid View

QUICK TIPS

1. If no Bids have been entered, "There are currently no bids on file for you to view at this time." Message will be displayed.
2. If contacts have been entered, you may edit the "Contracts", and "Bids" for any contract that has a status of "Active."

Note: When selecting "View Bids" an additional table is displayed of current bids. Above the Bid table is the "Contract Number" and "Contract Name" for the contract associated with the bid. Selection options are "Add New Bid" and "Add New Company, Edit Bid, and Company Detail."

(Bid Enter Screen)



Steps:

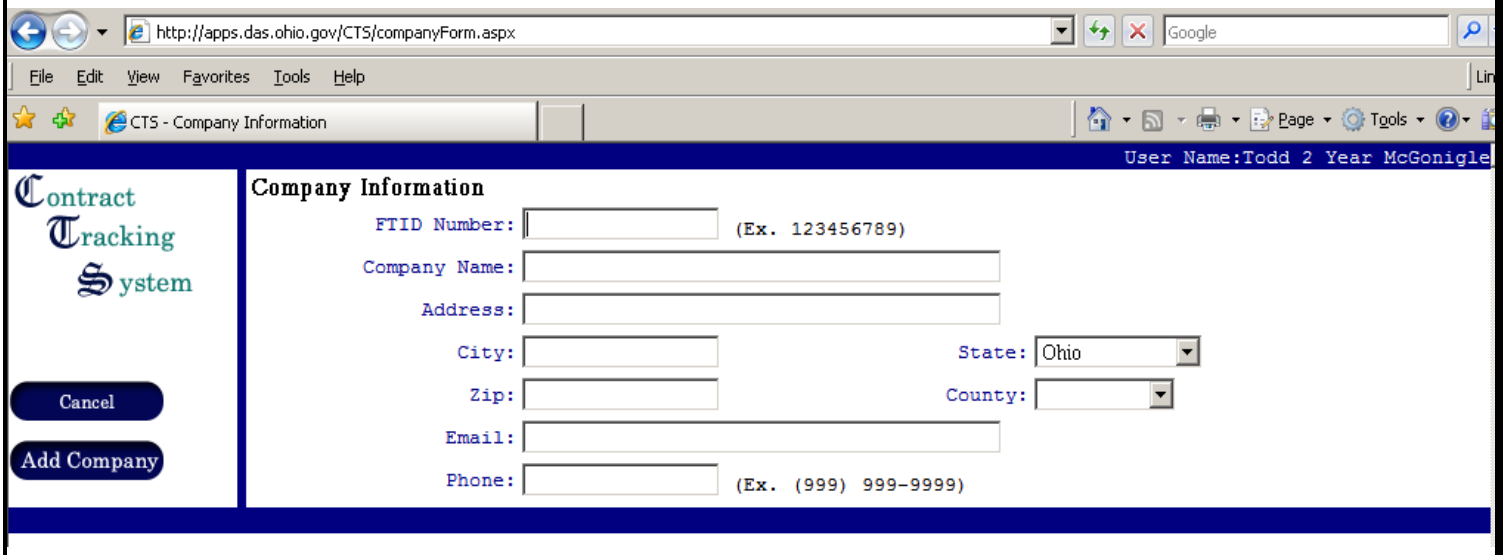
1. Enter known data:

- **FTID Number -** Enter FTID Number. **Note:** Dropdown box will show all FTID numbers in the database to select.
- **Company Name –** Enter Company Name. **Note:** Dropdown box will show all companies in the database to select.
- **Bid Amount** – Enter total bid amount.
  Awardee – Select if the bidder was awarded the contract.
- **Comments** – Enter any comments. Records of all comments are retained and available for review by anyone with proper access.
- Click on "Submit Bid" to save or "Cancel" to disregard the data.

QUICK TIPS

1. Contract Information is located at the top of the view. Contract headers display: “Contract Number” and “Contract Name.”
2. Select “Can’t Find Company” if a search does not locate the bid company.
3. Enter either FTID Number or Company Name. Select “Find.” If company is in database, known information will be populated.
4. “EDGE Status” is populated automatically if company is EDGE certified.
5. “COC Expiration Date” is populated automatically with the most current date of award.

(New Company Enter Screen)



Steps:

1. After selecting "Can't Find Company" the company enter screen is displayed.
2. Enter known data:

- **FTID Number** – Enter FTID Number.
- **Company Name –** Enter Company Name.
- **Address** – Enter address.
- **City** – Enter city.
- **State** – Enter state.
- **Zip** – Enter zipcode.
- **Email** – Enter email address.
- **Phone** – Enter phone number.

QUICK TIPS

1. FTID number must be entered in this format ##-#######.
2. After entering information you may select the entered company on the bid screen.
3. "Certification Status" field will be updated on next date.
4. Select "Can't Find Company" if a search does not locate the bid company.