



Dear Procurement Officer,

The Legislative Budget Board (LBB) Contracts Oversight Team (COT) will be sending out periodic emails to keep Contracts Database users apprised of new developments. This is the first in that series, and we hope that this offers useful information about what is changing in contract reporting.

#### Summary of Changes for the Week of October 12, 2015:

- New "Agency Approval Date" Field to be added to the Contracts Database
- New definition for "Requisition Date" field
- Error checking logic for all date fields
- New email address for pre-award notifications for major consulting services contracts

#### New Data Fields:

We have been working with state agencies and institutions to improve the LBB Contracts Database. Based on your feedback, we are adjusting some of the reporting requirements for contract submission.

A new field has been created for "Agency Approval Date". This field is required for contract submissions. This field specifies the date on which final approval (i.e. the last internal approval required before contract planning and development resources can be utilized) was given to proceed with contracting for the purchase or sale of goods and/or services. **The Agency Approval Date cannot be after the Solicitation Post Date or the Requisition Date.**

#### New Definition for Requisition Date:

The current "Requisition Date" field has been redefined and remains mandatory for contract submission. The Requisition Date now specifies the date on which the first purchase requisition was issued under the terms of the contract. The purchase requisition is a document generated by an agency or institution to notify the purchasing department of items it needs to order, their quantity, and the time frame for completing the order. **The Requisition Date cannot be before the Agency Approval Date.**

The changes to these two reporting fields will take effect immediately. Contracts already submitted to the database will have their records updated to reflect the inclusion of the Agency Approval Date field. For these contracts, as a default, the earlier of the Solicitation Posting Date or Requisition Date will be entered in the new Agency Approval Date field. If you would like to update this default entry or change the Requisition Date field to adhere to the new definition,

please contact our staff [Contract.Manager@lbb.state.tx.us](mailto:Contract.Manager@lbb.state.tx.us) so that we may assist you in making these changes to previously submitted contracts.

**Error Checking Logic:**

“Agency Approval Date”, “Solicitation Posting Date”, “Award Date”, “Requisition Date”, and “Completion Date” are designed to proceed in a chronological sequence. To help database users organize avoid data entry problems, logic has been introduced to check the order of these dates. If any are out of sequence with the others, an error message will let you know before submission.

**Notifications by Email:**

Section 2254.028 of the Government Code requires pre-award notice be provided to the LBB and the Governor’s Budget and Planning Office for major consulting services contracts. A consulting services contract is considered “major” when its value is reasonably expected to exceed \$15,000, or \$25,000 for an institution of higher education other than a public junior college. This notice must be given before entering into a major consulting services contract. COT is asking that agencies and institutions use the [ContractNotification@lbb.state.tx.us](mailto:ContractNotification@lbb.state.tx.us) email address for these notifications.

**Updated Documents:**

Several of our resource documents will be updated to reflect these new definitions, and to incorporate question posed by several agencies. These updates include:

- *Data Dictionary*: Includes the definition for “Agency Approval Date” and the revised definition of “Requisition Date.”
- *FAQs*: Revised answer for Question 35 to say that if there is no purchase requisition associated with the contract, enter the Agency Approval Date in this field.
- *LBB Contracts Database Transition Guide*: Adds bullet point for Agency Approval Date under “Data fields that will need updating.”
- *Reporting Contracts in the LBB Contracts Database (Instructions for State Agencies and Institutions of Higher Education)*: Updates screenshots and includes new definitions
- *LBB Contracts Database Quick Start Guide for Users*: Updates screenshots

We appreciate your effort to keep the Contracts Database up-to-date, and welcome your continued input. The COT understands that this is a new process, and wants to make sure that we communicate changes in a transparent way. As always, if you or your staff has any questions, please direct them to [Contract.Manager@lbb.state.tx.us](mailto:Contract.Manager@lbb.state.tx.us).

Sincerely,  
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