Louisiana Department of Natural Resources

Office of Conservation

Oilfield Site Restoration Bids Application
Version 1.3

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Document History

Version	Date	Additions/Changes
1.3	10/15/2021	Published

Create Contractor Account

1) If you do not already have an account for the Oilfield Site Restoration Bids application navigate to www.dnr.la.gov/osr and select the OSR Bid Application link to access the Login page.

2) Click the "Create Account" button on the login page to begin creating an account.

Figure 1. Create Account

3) The Create Account page will be displayed. Fields with a red background are required. Enter appropriate values for the required fields then click the "Create" button to create the new account and open the Contractor Dashboard.

Figure 2. Modal Dialog - Create Account

Contractor Dashboard

The Contractor Dashboard is comprised of 2 distinct sections:

- o My Information – This area shows the Contractor Information as it currently exists in the system. It facilitates editing the basic contractor information (i.e. contractor name, address, phone, …etc), as well as managing the list of company officers, adding additional email contacts, and approval documents (OSR OR-1 and the like).
- o Bid Section – The Bid Section is comprised of two different tabs:
  - ▪ Bid Packages I can take action on – Bid Packages that have been created and published by OSR. A Bid Package will drop off of this list once the Registration Date has passed if the contractor has not RSVPd for the site visit. This tab facilitates sending the RSVP, submitting questions, creating/editing a bid, submitting a bid to OSR, and withdrawing a submitted bid (before the bid open date).
  - ▪ My Previous Bids – Shows all Bid Packages that the contractor has bid upon in the past, including the Bid Package documents, and the contractors submitted bid documents.
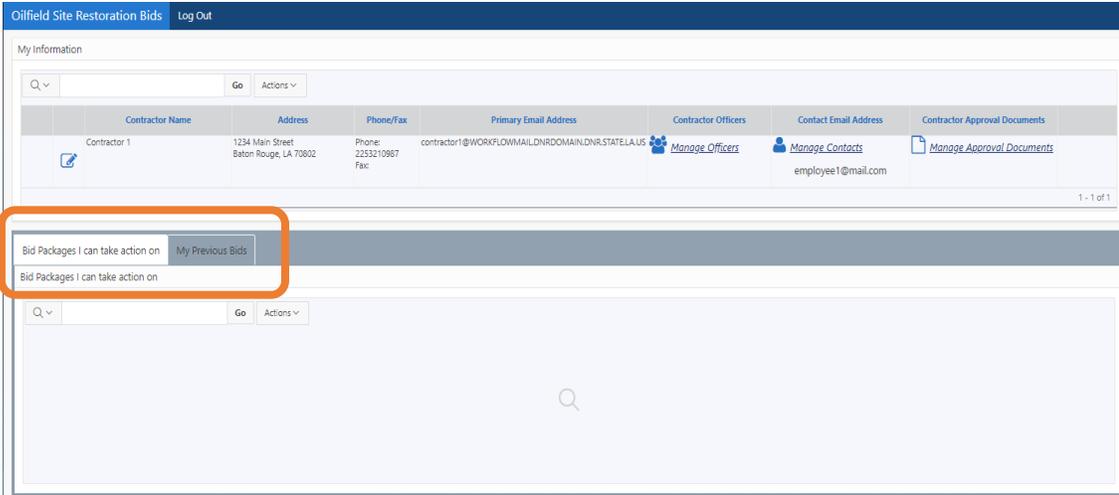
Figure 3. Contractor Dashboard - newly created contractor

1) Editing Contractor Information

a. Click the edit icon in the My Information section to open the Edit Contractor Information modal dialog.

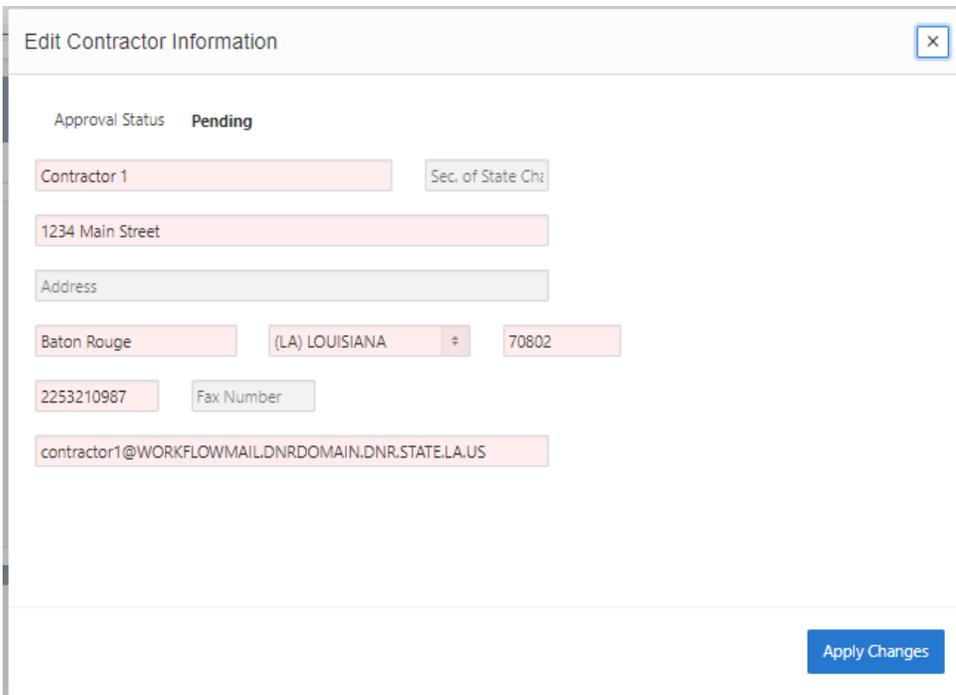b. Make any necessary changes and click the "Apply Changes" button to save the changes.
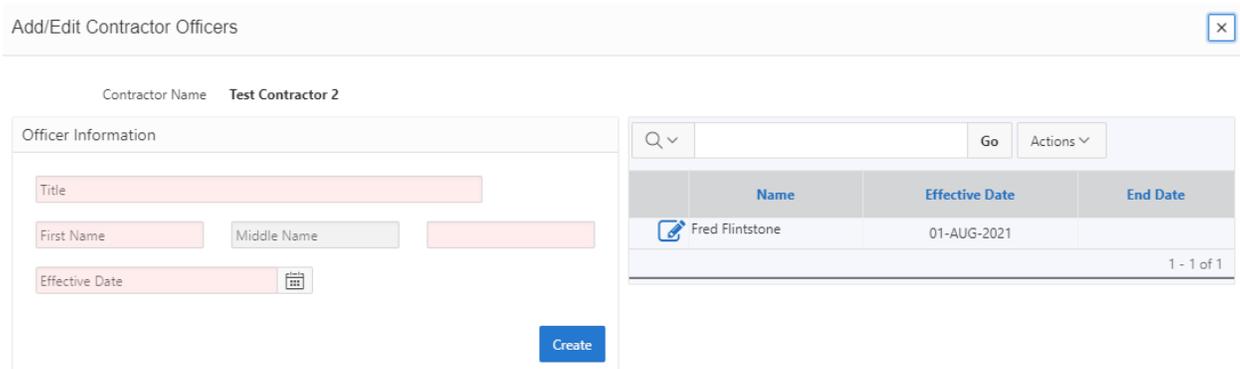

Figure 4. Modal Dialog - Edit Contractor Information

c. Click the "X" button in the top-right corner of the modal dialog to close it when changes have been completed or prior to clicking the "Apply Changes" button if you do not wish to save the changes that were entered.

NOTE: Contractor records are created in a "Pending" status. Only "Active" contractors that have been approved by OSR are eligible to participate in the bid process.

2) Managing Contractor Officers

A full listing of the company officers is required in order to become an approved contractor eligible to participate in the Oilfield Site Restoration bidding process.

a. Click the **Manage Officers** icon/link to open the Add/Edit Contractor Officers modal dialog.

Figure 5. Modal Dialog - Add/Edit Contractor Officers

b. This modal dialog allows for the capture of officer data by entering the required officer information and clicking the "Create" button.

c. Existing officer records can be edited by clicking the edit icon on the officer record in the officer listing.

d. Make the necessary changes and click the "Apply Changes" button to save the changes or click the "Clear" button to clear the edit form and discard any changes made.

e. Click the "X" button in the top-right corner of the modal dialog to close it when changes have been completed.
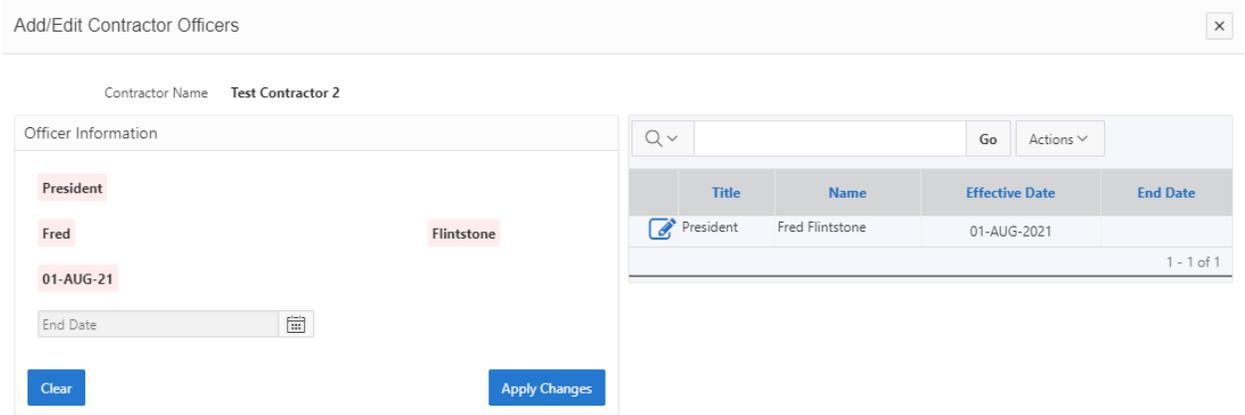
Figure 6. Modal Dialog - Add/Edit Contractor Officers (contractor edit)

NOTE: Contractors have the ability create officers, but can only add an end date when editing.

3) Managing Contractor Contacts

Contact information is used to allow a contractor to specify multiple recipients for most application generated emails.

a. Click the icon/link to open the Contractor Contacts modal dialog.
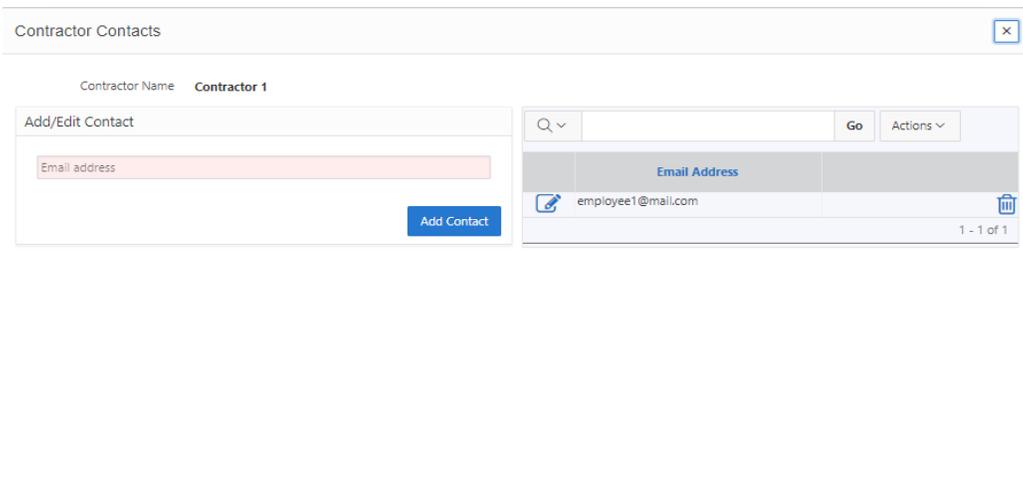
Figure 7. Modal Dialog - Contractor Contacts

b. This modal dialog allows for additional contact email addresses to be added to the contractor by typing an email address in the field and clicking the "Add Contact" button.

c. Existing contact email addresses can be modified using the ✎ edit icon. Selecting an email address for editing will load the contact record into the edit form.

d. Change the email address and click the "Apply Changes" button to save the changes or click the "Clear" button to clear the edit form and discard any changes made.

e. An existing contact can be deleted with the 🗑 delete icon.

f. Click the "X" button in the top-right corner of the modal dialog to close it when changes have been completed.

NOTE: Once a contractor is approved, any email sent to the contractor will also be sent to the additional contacts that exist at the time of sending.

4) Managing Contractor Documents

a. Click the 📄 *Manage Approval Documents* icon/link to open the Contractor Approval Documents modal dialog. This modal dialog can be used to upload any and all documents that OSR requires prior to approving a contractor be become an active participant in the oilfield site restoration bidding process.
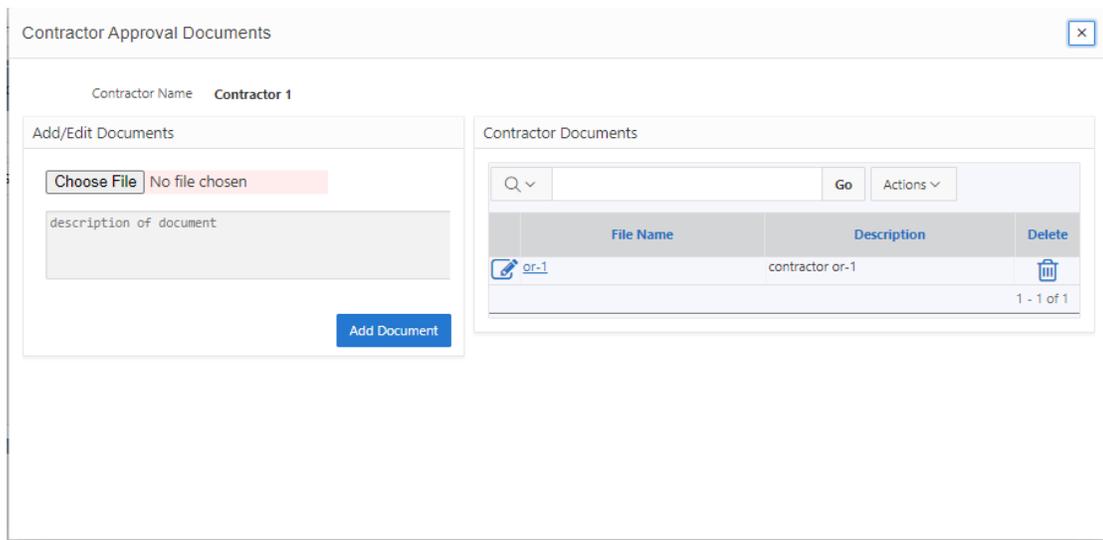
Figure 8. Modal Dialog - Contractor Approval Documents

b. Click the "Choose File" button to open a browser that can be used to locate a file to upload.

c. Optionally enter a file description, then click the "Add Document" button to upload the document.

d. Clicking the [edit icon] edit icon loads the document into the edit form, making the description available for changing.

e. The document name is a clickable link that will either open or download the document based upon individual browser / settings.

f. Clicking the [delete icon] delete icon will delete the document from the application. Note-documents can only be deleted if they have not been submitted.

g. If an approved contractor chooses to withdraw from the active contractor listing, upload a document and selected the "De-activate" button.

h. Click the "X" button in the top-right corner of the modal dialog to close it when changes have been completed.

5) Requesting Contractor Approval

After at least one officer and one document have been entered/uploaded and the contractor approval status is "Pending", an [Request Approval] icon/link will appear in the My Information section.

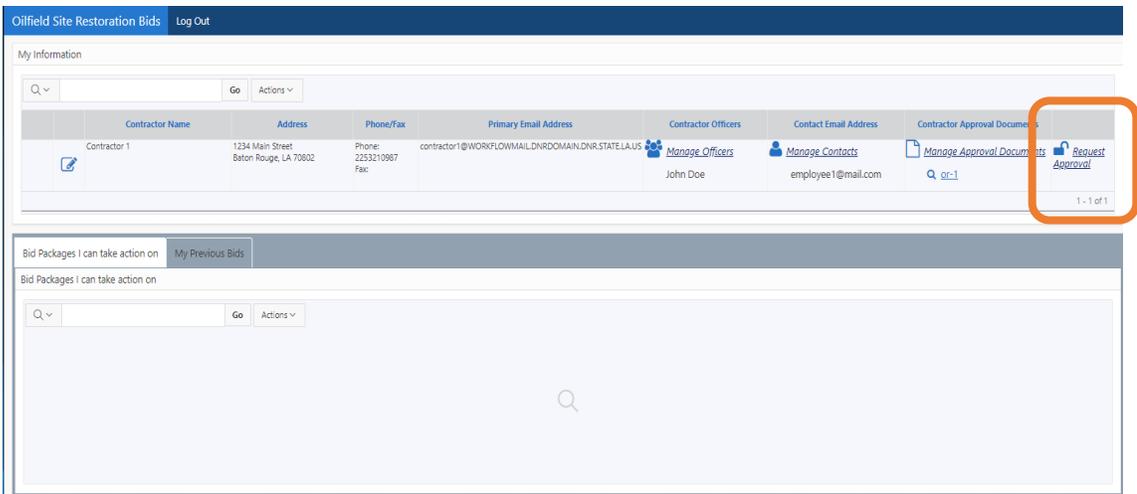a. A contractor can request a review of by clicking the [Request Approval] icon/link.

Figure 9. Contractor Dashboard - Ready to Request Approval

b. Clicking this link will send an email to OSR requesting a review of the submitted materials and will also change the status of the contractor record from "Pending" to "Evaluation".
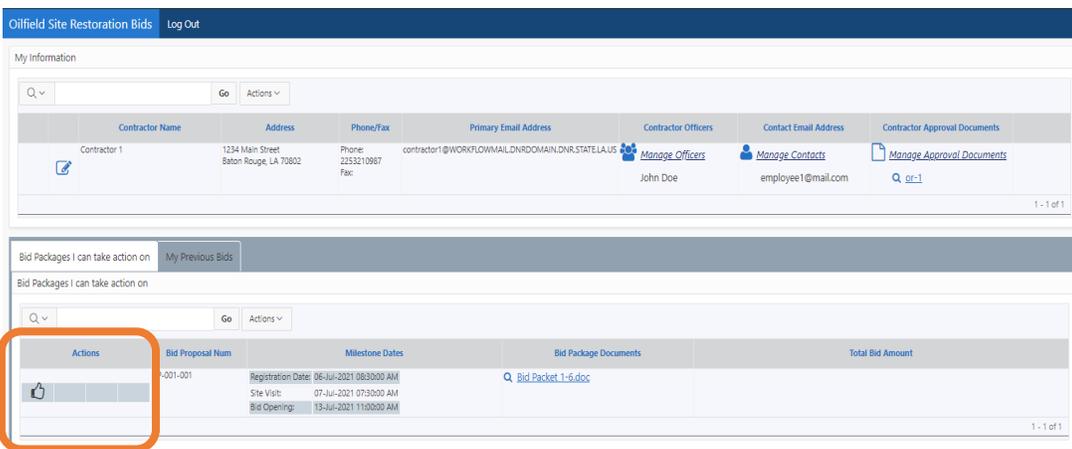
Figure 10. Email - Contractor Approval Request

c. The icon/link will disappear from the My Information section once the request is submitted.

NOTE: No Bid Packages will be visible to any contractor that is not marked as "Active" by OSR. Furthermore, only "Active" contractors and their associated contacts will be sent email via the application.

6) Registering for a Site Visit

In order to be eligible to bid on a particular Bid Package, with the exception of an Emergency Bid Package without a declared site visit, an approved contractor must attend the site visit that has been announced for the Bid Package.

a. If interested in participating in the bidding process for the Bid Package a contractor can submit an RSVP to register for the site visit by clicking the RSVP icon in the actions listed for the Bid Package. Doing so will create a site walk record which is displayed on the OSR Dashboard for the Bid Package.

b. The RSVP icon will be replaced by an Acknowledgement icon.

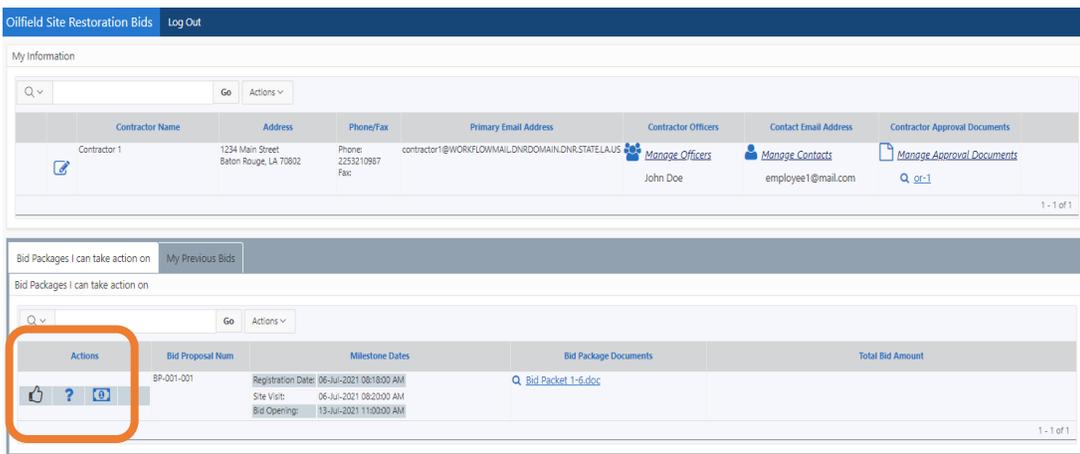*Figure 11. Contractor Dashboard - RSVP Sent*

NOTE: For Bid Packages with a defined site visit, the Bid Package will only be visible to approved contractors until the site visit registration date/time has passed. After that time, only contractors who submitted an RSVP for the site visit will see the Bid Package on their dashboard.

NOTE: For Emergency Bid Packages with no defined site visit date RSVP will not be required and the Bid Package will appear in the dashboard until the bid open date has passed.

7) Submitting Questions about a Bid Package

Each Bid Package will have a designated period during which time eligible contractors are able to submit questions pertaining to the Bid Package to OSR.

During the period of time when an eligible contractor may submit questions the [?] Submit Questions icon will appear.

Figure 12. Contractor Dashboard – Question Period

a. Clicking the [?] Submit Questions icon will open the Bid Package Questions modal dialog. The Bid Package Questions modal dialog allows contractors to see all questions that have already been submitted for the Bid Package, and submit their own by entering a question in the field and clicking the "Submit" button.
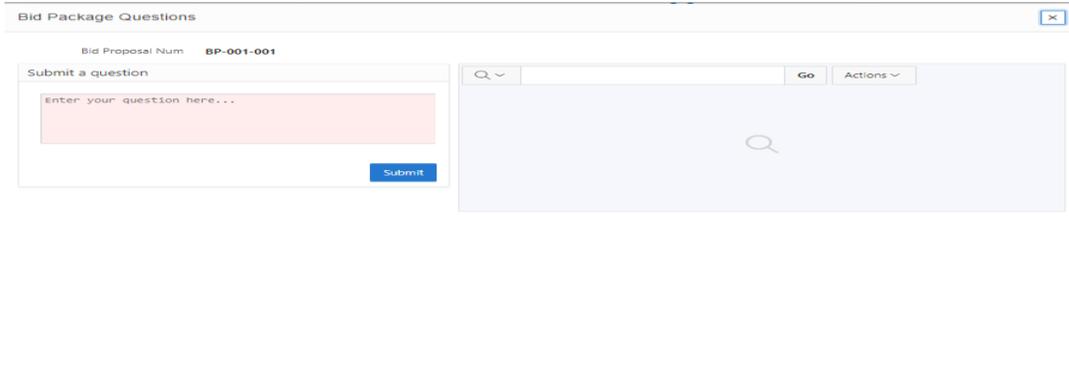
Figure 13. Modal Dialog - Bid Package Questions

> NOTE: An approved contractor will be deemed eligible to submit questions if they attended the required site visit or the Bid Package is an emergency with no defined site visit.

> NOTE: When a question is submitted, OSR will receive a notification email.
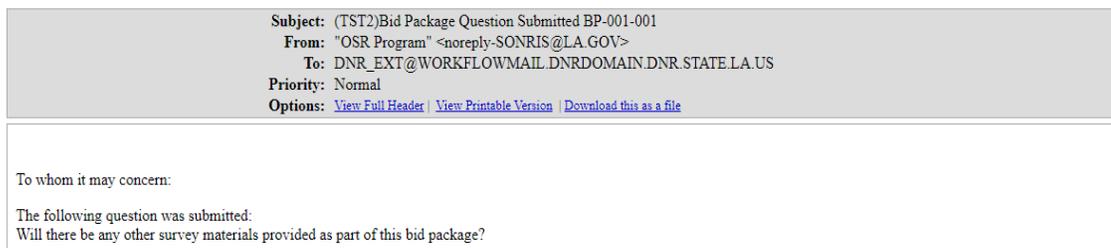

Figure 14. Email - Submitted Question Notification

8) Bidding on a Bid Package

When determined to be eligible, a contractor and all identified contacts will receive an email indicating that they may bid on the specific Bid Package.
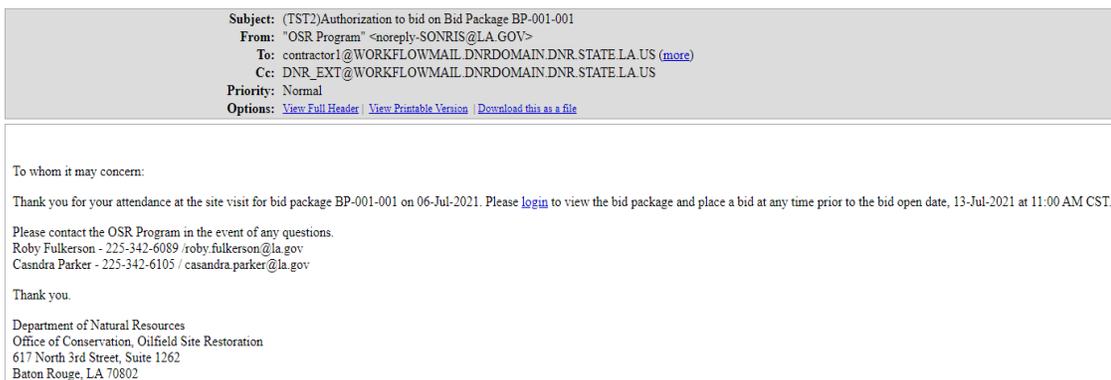

Figure 15. Email - Authorization to Bid on Specified Bid Package

At that time, the [icon] Manage Bid icon/link will be available on the Contractor Dashboard.

a. Clicking the [icon] Manage Bid icon/link will open the Add\Edit Bid modal dialog.

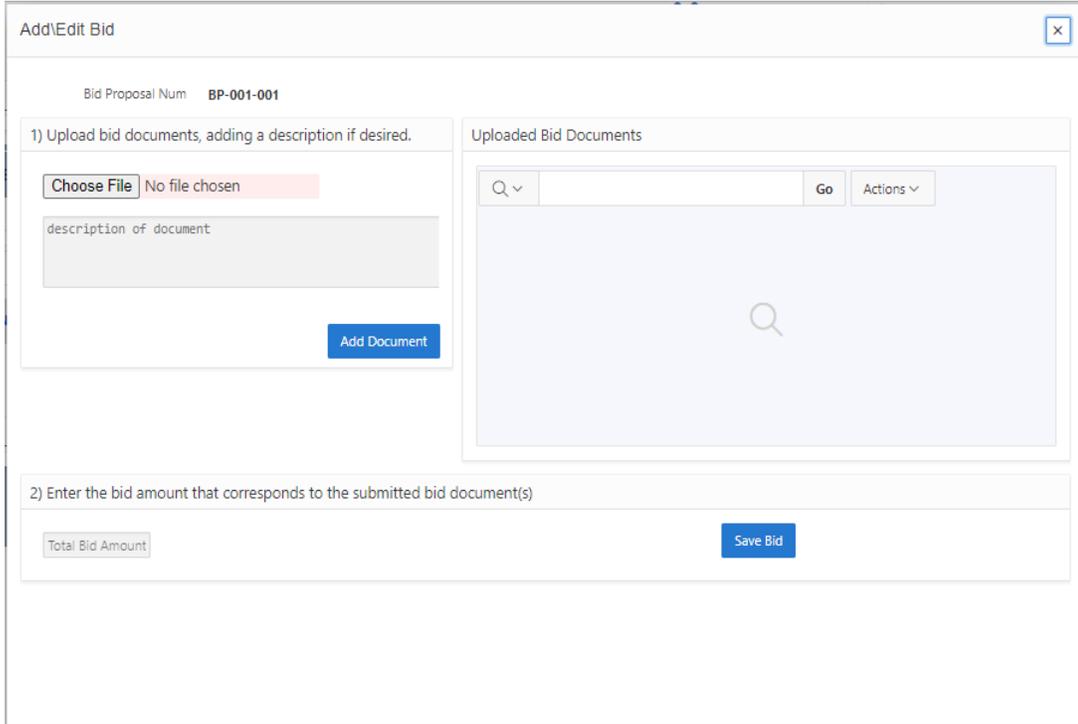*Figure 16. Modal Dialog - Add/Edit Bid*

b. The Bid action is separated into 2 distinct activities, allowing the contractor to upload, save, and modify bid information until they are ready to submit the bid.

First the Add\Edit Bid modal dialog is used to upload a contractor's bid and any other bid related documents.

Secondly, the contractor must enter the bid amount that is contained within their documentation.

Figure 17. Modal Dialog - Add/Edit Bid (Ready for Save)

    c. Once a value has been entered for the Total Bid and the bid saved by clicking "Save Bid" then the bid will be eligible for submission to OSR by clicking the Submit Bid icon on the Contractor Dashboard for the specific Bid Package.

Figure 18. Contractor Dashboard - Ready to Submit Bid

NOTE: An approved contractor will be deemed eligible to bid if they attended the required site visit or the Bid Package is an emergency with no defined site visit.

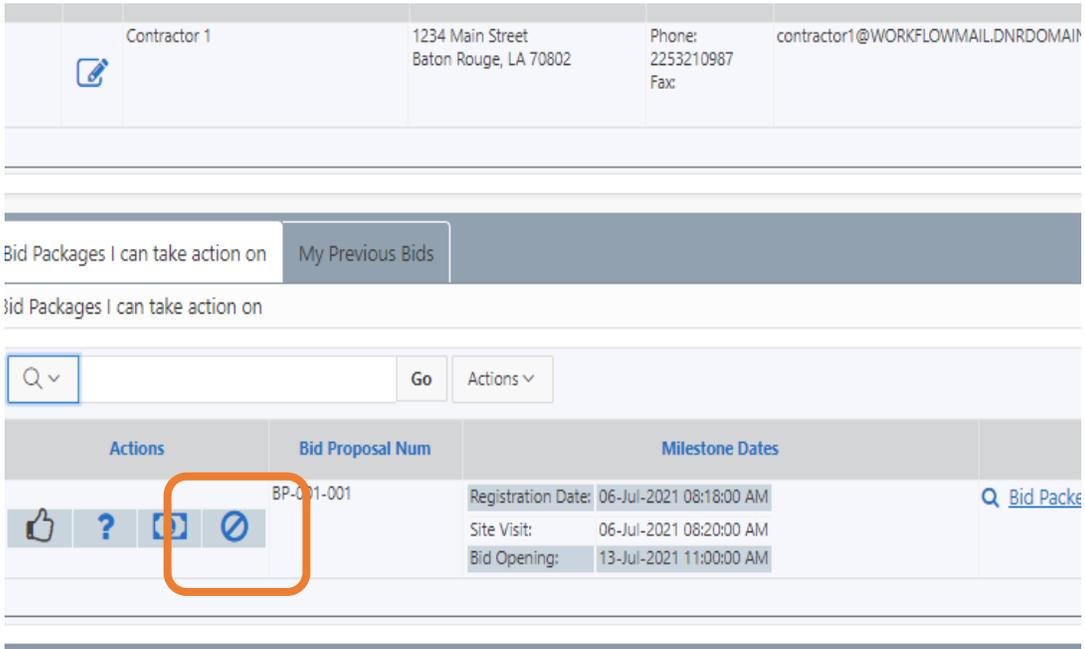NOTE: After a bid is submitted, the Submit Bid icon will be replaced with the Withdraw Bid icon.

NOTE: Un-submitted bids are not eligible for consideration at award time.

9) Withdrawing a Bid

Bids submitted in error may be withdrawn by the contractor at any time prior to bid opening.

Withdraw a bid from consideration by clicking the Withdraw Bid icon in the Actions of the Bid Packages I can take action on tab of the Contractor Dashboard.

Figure 19. Contractor Dashboard - Withdraw Bid

NOTE: Bids that are withdrawn by the contractor may be modified and re-submitted.

NOTE: Only bids that are marked with a submission date will be visible after the bid open date.

NOTE: A bid cannot be withdrawn after the bid open date.

NOTE: After a bid is withdrawn, the Submit Bid icon will appear, replacing the Withdraw Bid icon.

10) Renewing Approval

Approved contractors must re-submit documentation for renewal annually. An email to all approved contractors will be sent each year on December 1st at 6:00 a.m.
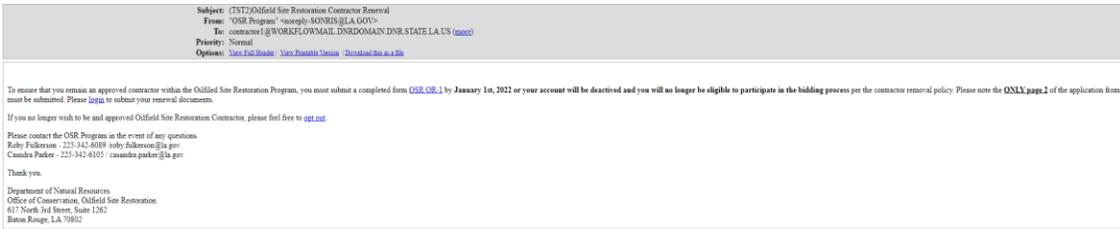
Figure 20. Email - Annual Renewal Notification

At that time, their approval status will be set to "RENEWAL" and the Request Approval icon/link will appear on the Contractor Dashboard.
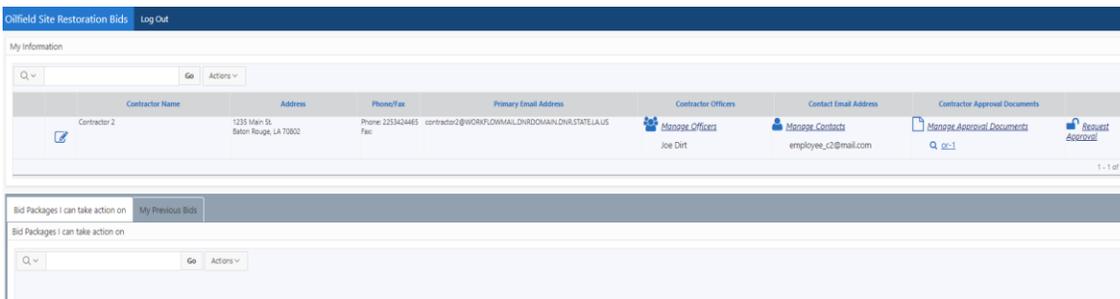

Figure 21. Contractor Dashboard - Request Approval (Renewal)

Contractors have until January 1st at 6:00 a.m. to submit updated documents for review.

Contractor information and documents can be updated using the steps outlined in previous sections. Once all of the necessary updates are complete click the Request Approval icon/link to submit the updated information to OSR for review.

Failure to complete the renewal process prior to January 1st at 6:00 a.m. will result in the contractor approval status being reset to "Pending".

NOTE: Contractors are only eligible to participate in the bidding process while they are in an active status or are under renewal review.

11) Viewing Past Bids

For historical perspective, contractors have been provided the ability to view their past activities. The My Previous Bids tab of the Contractor Dashboard displays all completed bidding processes for which the contractor created a bid, regardless of whether the bid was submitted for consideration or not.
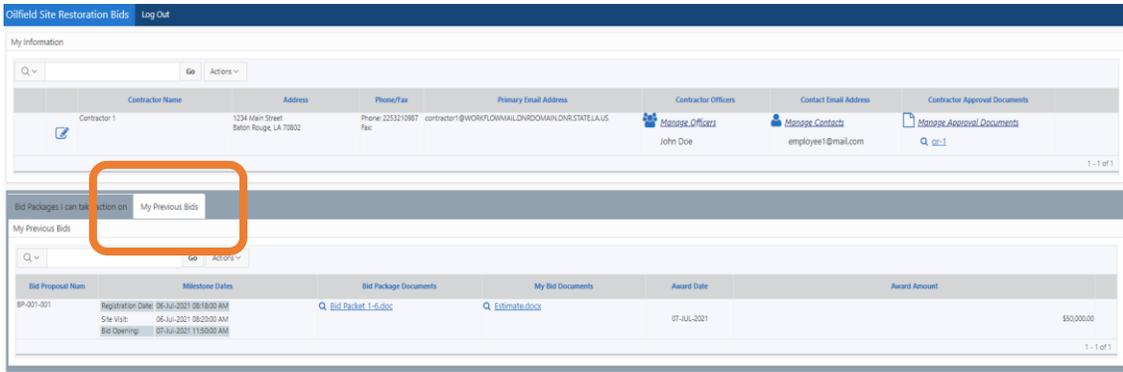
Figure 22. Contractor Dashboard - My Previous Bids

Contractors are able to review the Bid Package documents as well as their own bid documents for the listed Bid Packages by clicking the document links.