

Instructions for Use Memorandum

To: Customers Requesting use of the IT Hardware Express Procurement Option (EPO) 4671

From: Craig P. Orgeron, CPM, Ph.D

Date: August 27, 2025

Re: Instructions for Use: IT Hardware EPO 4671

1. Introduction

- 1.1 The IT Hardware EPO provides an economical, flexible mechanism for the acquisition of frequently requested, routine IT Hardware products and services.
- 1.2 The IT Hardware EPO is the result of a competitive procurement. ITS EPOs are multi-vendor awards that meet Mississippi requirements for legal purchases. IT hardware procurements made in accordance with this Instructions for Use Memorandum meet all Mississippi purchasing laws and requirements.
- 1.3 The IT Hardware EPO uses a Vendor Pool model. Vendors join the pool by responding to RFP No. 4671, which involves providing ITS information about their company and signing the EPO Purchase Agreement. Vendors are organized by category of products, and Customers solicit the Vendor Pool by category for product and pricing information using the process described in this Instructions for Use document.

2. Scope of the IT Hardware EPO 4671

- 2.1 IT Hardware EPO 4671 Categories:
 - 2.1.1 Personal Computers
 - 2.1.2 Presentation and Conference Equipment
 - 2.1.3 Enterprise Equipment
- 2.2 Below are important links you may need when using the IT Hardware EPO.

EPO Main Page	ITS > Procurement > Express Procurement Options
IT Hardware EPO Page	ITS > Procurement > Express Procurement Options > IT Hardware EPO 4671

Procurement Handbook	ITS > Procurement > ITS Procurement Handbook
RFP 4671	ITS > Procurement > RFPs and Sole Sources > RFPs and Sole Sources Advertised (Enter "4671" in the search box)

2.3 ITS houses the following information on the IT Hardware EPO webpage (see table of links):

2.3.1 A list of approved vendors for each category, including the contact information for each vendor.

2.3.2 This "Instructions for Use" memorandum, Solicitation Templates, and Additional Solicitation Considerations.

2.3.3 A copy of Attachment A: Technical Specifications, which details the scope of the 3 categories.

3. **Leveraging State Technology Resources**

3.1 ITS statute, House Bill 1450, Section 3. Section 25-53-5, Mississippi Code of 1972 Amended, article (t) requires that ITS manages one or more State Data Centers to provide information technology services on a cost-sharing basis to all State agencies. This is done in an effort to promote consolidation and cooperation in the acquisition of technology infrastructure for State government and that ITS acquires and operates the information technology necessary to provide services to the State agencies in a manner that maximizes efficiency and economy. Budgetary constraints require ITS to assess how we do business and to consider Mississippi State government as one enterprise and, where possible, build a technology infrastructure once, to be used by many.

3.2 Customers are encouraged to explore existing State resources, including those available at the State Data Center, in an effort to effectively share resources and leverage the State's investments in technology.

3.3 Customers may use off-site backup but are encouraged to consider the benefits of the ITS Data Center that offers storage and is staffed 24 x 7 x 365 days a year.

3.4 Prior to purchasing high-end storage items, customers are highly encouraged to consider off-site backup solutions as well as storage opportunities offered by ITS.

3.5 ITS reserves the right to limit the use of this EPO to our customers, particularly agencies, due to legislation or to ensure more effective use of the State Data Center.

4. **IT Hardware EPO Effective Dates**

EPO No. 4671 will be valid from the signature date of this memo until July 31, 2030.

5. **Who May Use**

- 5.1 This EPO may be used by Mississippi agencies, universities, community/junior colleges and governing authorities (cities, counties, school districts, etc.), collectively referred to as “Customer(s)”.
- 5.2 Any entity using this EPO must abide by the instructions in this Memorandum even if that entity is not under ITS purview.
- 5.3 Local governmental entities are able to use the EPO in lieu of conducting their own procurements, based on MS Code 31-7-13(m)(xi) that allows ‘governing authorities’ to do so as an exception to the bidding requirements found in Public Purchasing Code.

6. **Dollar Limitations of Use**

- 6.1 Customers must determine the total lifecycle cost of their project during the planning process. Any additional purchases items and/or services must be calculated as part of the total lifecycle of the project when determining Dollar Limitations or ITS approval thresholds.
 - 6.1.1 If Customers wish to purchase additional items after the initial solicitation and purchase is complete, they may do so if all the following conditions are met:
 - 6.1.1.1 The additional items are the same as the items requested in the original solicitation;
 - 6.1.1.2 The price is the same as the price proposed in the Vendor’s original proposal; and
 - 6.1.1.3 The total lifecycle cost (the original purchase and any additional purchases) are below any Dollar Limitations or ITS approval threshold. Additional purchases that cause the total lifecycle cost to reach any threshold are not permitted without prior approval by ITS through a planned purchase.
- 6.2 The purchase limit is \$500,000 per project without prior approval from ITS.
 - 6.2.1 For K-12 Schools, the dollar limitation is interpreted by ITS to be \$500,000 per project per school/campus with a maximum dollar limitation of \$1,000,000 per school district per fiscal year for a project that spans multiple schools within the district.
- 6.3 Projects costing in excess of \$500,000, are beyond the scope of this delegated process and subject to full ITS review and authorization. Authorization to exceed the EPO dollar limitation is issued pursuant to ITS rules and regulations. These rules and regulations are stated in the ITS Procurement Handbook available in the Publications section of the ITS website.

- 6.4 Per ITS rules and regulations, projects with a cumulative total in excess of \$1,000,000 or projects for only professional services in excess of \$500,000 are subject to ITS Board approval. A business case must be completed on all IT projects requiring ITS Board Approval, and the ITS Board must approve the project prior to the purchase. ITS has developed an IT Project Business Case Workbook to assist agencies in preparing the business case. Business case documentation may be found on the ITS website at: <https://www.its.ms.gov/services/planning-agency-it-plans>

7. **Other Limitations of Use**

- 7.1 Brand Specification – In general, when soliciting responses from IT Hardware EPO Vendors, specifications must be open and competitive and not name a specific product or manufacturer. The ITS Procurement Handbook provides guidance on when it is appropriate to issue brand specific specifications.

- 7.1.1 All Customers making purchases that require a specific brand must complete the *Justification for Brand Specification Request Form* available on the ITS website [here](#). The ITS Procurement Handbook provides guidance on when it is appropriate to issue brand specific specifications.

- 7.1.2 IT Hardware EPO 4671 does permit the issuance of brand specific specifications under the following conditions:

- 7.1.2.1 There are multiple EPO partners who can provide competitive pricing for the requested acquisition.

- 7.1.2.2 Justification for issuing the brand specific solicitation is well-documented on the *Justification for Brand Specification Request Form* and must be kept with your purchase/audit file. Note: It is not necessary to submit this form to ITS for IT Hardware EPO 4671 purchases unless your project requires further review from ITS.

- 7.2 ITS may decide whether use of this EPO is appropriate or not for a given project.

8. **Preparing the Solicitation**

- 8.1 Review the *Solicitation Workbook* published on the [ITS Website](#).

- 8.2 Select the appropriate solicitation template for your project:

- 8.2.1 Where price is the only consideration, use the template titled *IT Hardware Solicitation Template - 100% Cost*.

- 8.2.2 When a Lowest and Best offering is appropriate, use the template titled *IT Hardware Solicitation Template – Lowest and Best*.

- 8.3 Verify the requirements for your purchase.

- 8.4 Entities using this EPO must have well defined business objectives and technical requirements for the items being purchased. These objectives and requirements will be used to evaluate Vendor offerings and to determine the lowest and best solution.
- 8.5 Fill out the selected *Solicitation Template* with your developed specifications, project timeline, and how responses will be evaluated.
- 8.6 Describe your existing equipment and/or software in your solicitation.
- 8.7 If a Customer wishes to capture pricing for optional items, meaning products or services that, at the time of Solicitation, the Customer is undecided if they will purchase or not, the Customer must include these optional items in their Solicitation and their cost evaluations. Customers must also include the cost for the optional items in their total lifecycle cost for determining Dollar Limit Thresholds, regardless of if or when these items will be purchased.
- 8.8 Leasing:
 - 8.8.1 Lease Agreements are allowed.
 - 8.8.2 Lease-To-Own agreements are NOT allowed.
 - 8.8.3 Lease agreements must have a maximum length and customers must use the maximum length to determine the total lifecycle cost of the agreement.
- 8.9 It is the Customer's responsibility to evaluate Vendor proposals and document that they are selecting the response that is "lowest and best". Customers must include in their Solicitation how this evaluation will be conducted.

9. **Solicit Quotations and Evaluate Vendor Offerings for Lowest and Best**

- 9.1 Once the technical specifications are developed and the Solicitation Template is complete, send your Solicitation to all vendors within the relevant categories to your project using the Vendor Pool contact information listed on the ITS website <https://www.its.ms.gov/procurement/IT-Hardware-EPO-4671>
- 9.2 Customers must allow at least five (5) business days from the date the Solicitation is released for vendors to respond. Customers will not begin the evaluation of responses until the proposal window has closed. A longer period is recommended for Solicitations with more complex requirements. If you decide to include a vendor question and answer period, Solicitation responses should be due no less than five (5) days after the answers to questions received have been distributed to the Vendor Pool.
 - 9.2.1 Responses to questions submitted should be sent to the entire Vendor Pool, not just to Vendors that ask questions.

- 9.3 It is your responsibility to evaluate and select the products and services that best meet your needs.
 - 9.3.1 If the 100% Cost Solicitation Template is used, the lowest valid proposal must be selected.
 - 9.3.2 If the Lowest and Best Solicitation Template is used, evaluation documentation must include sufficient justification for selection of the lowest and best proposal.
 - 9.4 Verify that Vendor offerings meet your technical specifications. Demonstration packages may be available. If you are not familiar with the equipment, ask Vendors for a demonstration package. Confirm that your existing equipment and software will be compatible with the equipment purchased.
 - 9.5 Ensure all proposal responses adhere to the following:
 - 9.5.1 A reference to IT Hardware EPO 4671.
 - 9.5.2 All components on the quotation must be within scope of EPO 4671. Products or services purchased in conjunction with EPO products that are not specifically described and authorized on the published EPO are "Non-EPO Items" and the authority for purchasing such items must come from public purchasing dollar limitations or other procurement tools. "Non-EPO Items" should NOT be included in the same purchase order as EPO items.
 - 9.6 Once all proposals have been evaluated and a Vendor is selected, Customer will extend an award notification via email to all vendors who submitted a proposal. The notification should include the awarded Vendor name.
10. **Place Your Order**
- 10.1 Place orders directly with awarded vendor.
 - 10.2 Confirm your order with the vendor and issue appropriate purchase orders:
 - 10.2.1 Reference IT Hardware EPO 4671 on your purchase order.
 - 10.2.2 The purchase order and Vendor proposal response should match in terms of items purchased, quantities purchased, and total amount.
11. **Mississippi's Accountability System for Government Information and Collaboration (MAGIC)**
- 11.1 State agency customers are required to purchase through Mississippi's Accountability System for Government Information and Collaboration (MAGIC).
 - 11.1.1 The Contract Number and Supplier Number are provided on the ITS website: <https://www.its.ms.gov/procurement/IT-Hardware-EPO-4671>

ex. MAGIC Contract Number - 8500000xxx

ex. MAGIC supplier Number - 3100020xxx

- 11.2 State agency customers will be required to use NIGP codes when purchasing through Mississippi's Accountability System for Government Information and Collaboration (MAGIC). The following NIGP codes will be used for products purchased using the IT Hardware EPO 4671.

NIGP Code:	EPO Category	NIGP Product Description
20453	Personal Computers	Microcomputers, Desktop or Tower-based
20454	Personal Computers	Microcomputers, Handheld, Laptop, and Notebook
20496	Personal Computers	Workstations: SPARC, RISC, etc. (For Use With CAD/CAM, etc.)
20460	Personal Computers	Monitors, Color and Monochrome (CGA, VGA, SVGA, etc.)
20775	Presentation and Conference Equipment	Projection Devices and Accessories: Interactive Conferencing Boards, LCD, Pads, Panels, etc.
20491	Enterprise Equipment	Servers, Microcomputer (Application, Database, File, Mail, Network, Web, etc.)
20689	Enterprise Equipment	Mini & Mainframe Computers, Storage Devices, Electronic
28754	Enterprise Equipment	Power Supplies, Computer Room
20687	Enterprise Equipment	Network Components: Adapter Cards, Bridges, Connectors, Expansion Modules/Ports, Firewall Devices, Hubs, Line Drivers, MSAUs, Routers, Transceivers, etc.
20493	Personal Computers	Terminals and CRTs: Data Processing Systems
84056	Presentation and Conference Equipment	Teleconference Systems, Audio/Video (To Include Video on Demand Systems)
84055	Presentation and Conference Equipment	Switchers, Audio and Video
20880*	All Categories	Software, Microcomputer (Not otherwise Classified)
92047	All Categories	Support Services, Computer (Includes Computer Warranties)
92031	All Categories	Installation of Computers, Peripherals, and Related Equipment (Including Software)
95877	All Categories	Project Management Services
96182	All Categories	Transportation Services (Not Otherwise Classified)

*Refer to Attachment A: Technical Specifications of the RFP for when software is allowed.

11.3 The following must be uploaded to MAGIC for EPO 4671 purchases as attachments to your Purchase Order:

- 11.3.1 A copy of all responses received.
- 11.3.2 A copy of the Solicitation.
- 11.3.3 A copy of brand specification documentation, if applicable.
- 11.3.4 Documentation demonstrating that the solicitation was sent to all vendors in the relevant pool.
- 11.3.5 Documentation detailing your evaluation and justifying your selection.
- 11.3.6 A copy of this Instructions for Use Memorandum.
- 11.3.7 If the purchase is related to a project that is a part of the Agency's IT Plan, a copy of the related planning form from the ITS planning system.

12. **EPO Purchase Audit Integrity**

12.1 It is the responsibility of every customer using the EPO to maintain proper records to reflect that all procurements from the EPO are made in accordance with ITS policies and procedures.

12.2 What Goes in Your Purchase/Audit File?

- 12.2.1 Make sure you provide adequate documentation that you followed the recommendations and directives in this Instructions for Use Memorandum. At a minimum, include:
 - 12.2.1.1 A copy of brand specification documentation, if applicable.
 - 12.2.1.2 A copy of the Solicitation.
 - 12.2.1.3 A copy of the purchase order.
 - 12.2.1.4 Documentation demonstrating that the solicitation was sent to all Vendors in the relevant category.
 - 12.2.1.5 A copy of the approved vendor list spreadsheet concurrent with the selection of the winning Vendor.
 - 12.2.1.6 A copy of all proposal responses received.
 - 12.2.1.7 A copy of this Instructions for Use Memorandum.

12.2.1.8 If the purchase is related to a project that is a part of the Agency's IT Plan, a copy of the related planning form from the ITS planning system.

12.2.1.9 Documentation of the evaluation process.

12.2.1.10 Any additional project-related documentation or justification.

13. **Contracts and Additional Considerations and Best Practices**

13.1 The EPO has its own contract, the "Purchase Agreement," executed between each EPO Vendor and ITS. Should your purchase be large or involve special terms, you may wish to negotiate a supplemental contract specific to your situation with the vendor at the time of purchase to address any additional concerns not addressed in the EPO Purchase Agreement.

13.2 Returning Defective Product to Vendor:

13.2.1 The EPO Purchase Agreement provides in Articles 7.7 through 7.10 for circumstances when the customer may test and evaluate the purchased product to ensure it is not defective and that it performs to the specifications published in the EPO. Please be aware that the EPO Purchase Agreement does not provide for "buyer's remorse", where the Customer may send back a product because the Customer has changed its mind or wants something else. The vendor often is not allowed to ship a product back to the manufacturer if it is not defective. This is particularly true in cases of special orders or configurations.

13.2.2 Please review Articles 7.7 through 7.10 and work with your vendor ahead of time to make sure you are ordering equipment that will fit your needs. If the delivered product is defective, you are protected and may return the product if you notified the vendor within the ten (10) working day acceptance period. Although some vendors may be able to work with you on a return for non-defective equipment, this is not an EPO requirement. Some vendors may choose to charge the customer a "re-stocking" fee in order to take back unwanted products. The Customer assumes responsibility for all "re-stocking" fees in this instance as a condition for using this EPO.

13.3 Shipping costs for a standard delivery are included as part of the product purchase price. If the delivery is beyond a standard delivery due to issues such as "weight/size" or "white glove treatment", the additional freight/transportation charges may be passed along to the Customer and should be line-itemed on the vendor's quotation.

13.4 Customers have the right on turnkey projects to secure certain products from other existing ITS contracts if it is in its best interest to do so.

14. **To Report Problems or Request Assistance**

If you have any feedback that may help us to improve this process or if you have any problems with your EPO order, please let ITS know. We suggest you notify the vendor of the problem in writing and send a copy to ITS. You may contact us in writing by one of the following ways:

14.1.1 E-mail: isshelp@its.ms.gov

14.1.2 FAX: (601) 713-6380

14.1.3 Mail: ITS, 3771 Eastwood Drive, Jackson, MS 39211

If you have questions about using the EPO, please contact the Procurement Help Desk at isshelp@its.ms.gov.

ITS is also available to host training on how to use our EPOs and other procurement options at a customer's request. Please contact the ITS Procurement Help Desk if interested.