

Business Partner Process for the IBM HW Support Extension Offering

Effective 8/23/2018 the new IBM HW Support Extension offering should be utilized to quote HW maintenance support extensions after a machine type/model has been withdrawn from service

Notes regarding the IBM HW Support Extension:

- This offering should be used for all machines withdrawn from service unless they are being added to an existing contract that already has End of Service BP offering on it and if the client already has a signed SOW for the End of Service BP offering. Note this new offering may be used even if the end user has the old offering contracted, but will still require the client to sign the **new** SOW. If using the old End of Service BP offering skip down to that section found on page 5 of this document.
- This offering cannot be renewed via the Existing Discount Renewal (EDR) process.
- Offering may be contracted via a standalone proposal, combined with other ISAT offering(s) or as an add to an existing contract, however, it must be added to the same contract where the machine is last on HW maintenance for special bid discounts to automatically carry over to the support extension.
- Machines that are on IBM maintenance at the time of EOS withdrawal will be eligible to receive any special bid discounting approved for the regular maintenance if the IBM HW Support Extension is added to the contract it resided on for regular HWMA.
- If the machine was previously supported by the End of Service for BP offering the BP must provide expiring contract number in the COL record to verify prior pricing. If this is not provided for machines that were on EOS MA prior reference price may be used.
- End of Service support requests can only be approved for a maximum of up to one (1) year, however, may be approved for a lesser period due to parts or labor constraints. Please do not request coverage greater than one (1) year.
- The new offering “**IBM HW Support Extension**” applies the current reference price from ISAT plus any entitled term, prepay, and price protection as applicable. This is NOT a plug a price offering. This offering, when added to an existing contract, will also inherit any special bid discounts that were approved and applied to the contract at the category, machine type or machine type/model level. Note that this will only happen if the **IBM HW Support Extension** is being quoted as a merge to the same contract the HW Maintenance resides upon with said previously approved discounts. It is the BP team's responsibility to check that pricing is what is desired, and if not, or there is question regarding pricing, an End of Service Extension request need be submitted BAU.

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- Although, ISAT will provide a price when adding the IBM HW Support Extension offering to a proposal, an approval from IBM Service Planning **IS REQUIRED** before providing pricing to a customer and in some cases to enable speed to market a 'pre-approval' has been provided for select machines.
- A color-coded spreadsheet or the **BP Type-Model Approval & EOS Lifecycle Tool** is available in the Document Library on PartnerWorld. The file contains two tabs to assist in determining EOS type/model quoting status, one tab outlines all type/models that have gone EOS since 1/1/2018-present and the other tab is the EOS Lifecycle tool. The sheet also contains README files to assist the user in utilizing the tool.

How the BP HW Support Extension Pre-Approval File Works:

- The pre-approval tab will contain type/models that have gone EOS 1/1/2018-present.
- If the type/model has been pre-approved to quote (not requiring a EOS support extension request submission) it will be in a green status as listed in the **BP HW Support Extension Pre-Approval File**. It is required that the ISAT user not exceed the date listed in the "Approved HW Support Extension Stop Date" column of the file as the services end date on the ISAT proposal. Business Partners are enabled to quote a machine that is '**green**' outside of 90 days to end of service date.
- If the type/model is yellow, it must be submitted via the BP EOS process in COL to be reviewed by IBM Service Planning to determine if it may be quoted for IBM HW Support Extension. The submission must be made via COL transaction type "End of Service Request" with an EOS template completed. Please refer to the EOS template for guidance completing the form.
- If the type/model is blue it means alternative support solutions may be available, either full vend or via an IMS type/model. Refer to the BP HW Support Extension Pre-Approval File README tab for further information.
- If the type/model is red it means IBM does not have the means to support the equipment and it cannot be quoted under any available offerings.
- Machines not listed in the **BP HW Support Extension Pre-Approval File** may not be supportable and require additional research. First the user should refer to the **US End of Service (EOS) Lifecycle Support** tab in the **BP HW Support Extension Pre-Approval tool** to determine if/how the machine type/model may be supported and take appropriate action based upon the category listed for that specific type/model. If it is showing marked green for "Future Dates COL Response Postponed" it means IBM

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Service Planning cannot yet determine the support status and the user should check back when closer to 90 days of EOS date. Do not submit via the EOS COL process until such time as Service Planning will not be able to make a determination.

- The IBM HW Support Extension offering requires a service start and service stop date be entered and **must** not be left with system defaulted stop dates.
- IBM is not liable for quotations, omissions, proposals provided, contracts registered that exceed the Approved HW Support Extension Stop Date and/or business partner generated pricing.

Process Steps

Step 1. Determine the approval status of the machine type/serial number

Review the current version of the **BP HW Support Extension Pre-Approval File** posted on PartnerWorld in the Document Library section where these instructions are housed. If the machine type/model is listed move to Step 2.


If the machine type/serial number is not listed refer to the **IBM End of Service (EOS) Lifecycle Support** tab to determine if/how the machine type/model may be supported and act based upon the category listed for that specific type/model.

Step 2. Quote as appropriate based upon the support option listed for the machine type/model.

- **OK to Quote:** This machine/serial may be quoted using the IBM HW Support Extension offering through the date listed in the “Approved HW Support Extension Stop Date” column on the **BP HW Support Extension Pre-Approval File**. ISAT user must enter this date in the “Services Effective To” field in ISAT. *Note* IBM is not liable for quotations, omissions, proposals provided, contracts registered that exceed the Approved HW Support Extension Stop Date and/or business partner generated pricing.
 - a) ISAT user creates an add to contract from the parent contract where the HW maintenance for the machine is expiring.
 - b) ISAT user adds the IBM HW Support Extension offering, then adds the pre-approved **GREEN** machine(s) by serial number to the offering.
 - c) ISAT user must enter a start and stop date for each serial number. A stop date *must* be entered in the “Services Effective To” field in ISAT consistent with the date found in the listed in the “Approved HW Support Extension Stop Date” column on the **BP HW Support Extension Pre-Approval File**.

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- d) ISAT user may verify if discounts have carried over from previously approved discounts applied to the contract by comparing price produced to a standalone quote or to previously billed HW maintenance.
 - e) ISAT user prepares documents for release to the end user client including the Statement of Work.
- **Needs SP Review:** This machine type/serial number requires additional review by IBM Service Planning to determine if it can be supported.
 - a) Submitter to complete the EOS template spreadsheet located on the PartnerWorld Document Library page. The appropriate page may be reached via COL by clicking on “Rel links” to the top of the screen. A new window will open with links, click the “BP Special Bid forms and process documents” link which takes you to the PW “Channel Support, Business Operations and other materials” page. Find the End of Service topic:

New! Required for End of Service (EOS) IBM Machines 

This form must be completed and submitted in the COL request for machines in which you require a hardware maintenance EOS quote.
 - The template has an example tab that shows and explains all the data that is required and how to complete the form. Do not enter data on that tab, use only the “Input Data” tab for data entry. Please paste only by using “Match destination format or “Paste Special” so as not to change formats in the sheet.
 - *Note*** as of May 2018 feature codes are no longer required on EOS submissions.
 - b) ISAT user creates an add to contract from the parent contract where the HW maintenance for the machine is expiring.
 - c) ISAT user adds the IBM HW Support Extension offering, then adds machines by serial number to the offering.
 - d) Distributor/SP1 submits request via COL using the End of Service Request transaction type and attaches the EOS template and ISAT proposal.
 - i. Select Special Bid Quote and Waiver Requests supplier organization.
 - ii. Select the End of Service transaction type.
 - iii. Complete all COL template fields including the last contract # the machine(s) were on for regular or EOS maintenance.
 - iv. Ensure you have the EOS with MVS path document flow selected or SP EOS with MVS path, if appropriate.
 - v. Attach the fully completed EOS Template and ISAT proposal.
 - vi. Submit the transaction.
 - e) BPSOS team will send to IBM Service Planning for review and enter approved stop date in the “Services Effective To” field in ISAT consistent with the date provided by Service Planning, if approved. ****NEW AS OF JANUARY 2019**** If IBM HW Support Extension is denied by Service Planning and

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vending is an option, the IBM BPSOS will submit request for MVS vendor review without returning request to the BP submitter. If approved for MVS coverage the BPSOS Sales Specialist will return MVS approval documents to the BP submitter.

- **OK for IMS:** Blue machine type/models listed “OK for IMS” are supported via an IMS offering. The IMS type/model is listed on both the pre-approval and lifecycle tabs. User must quote via ISAT following the same process as other IMS enabled type/models.
- **OK to Vend:** Blue machine type/models listed “OK to Vend” may supported via a vended solution and follows the same process as OEM vended equipment:
 - a) User must complete a MASVEND form and include all features (billable and non-billable) and submit the request via the MVS Express transaction type in COL.
 - b) Submission will follow the documented MVS process found on PartnerWorld and approval will be returned via that process if approved by a vendor.
- **Do Not Quote:** Machine type/models listed red cannot be supported beyond the withdrawn from service date and cannot be vended. There is no coverage option for this type/model.
- **MACHINE/SERIAL NOT FOUND** on the **BP HW Support Extension Pre-Approval File:**
 - a) Check the status on the **IBM End of Service (EOS) Lifecycle Support** tab and follow submission instructions outlined in the tool. If a type/model is in the gray status “Future Dates COL Response Postponed” it means IBM Service Planning cannot yet determine the support status and the user should check back when closer to 90 days of EOS date. Do not submit via the EOS COL process until such time as Service Planning will not be able to make a determination.