



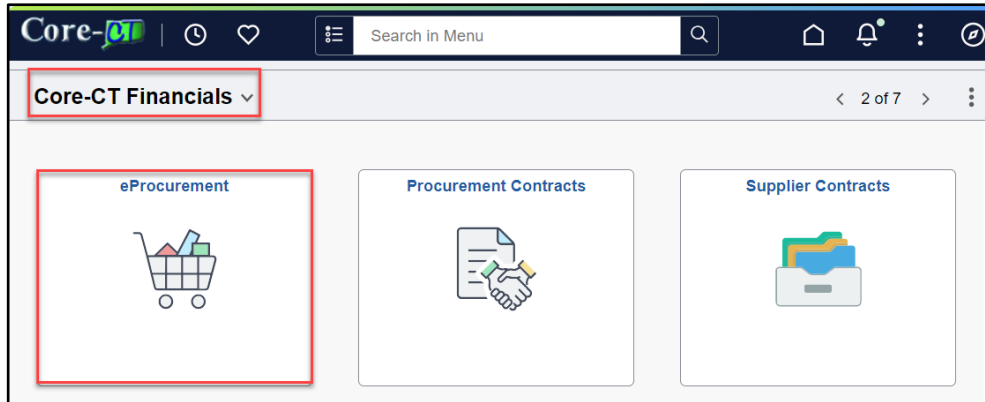
PSA POS Agency Approval

Process for Agency PSA_POS Agency Approvers

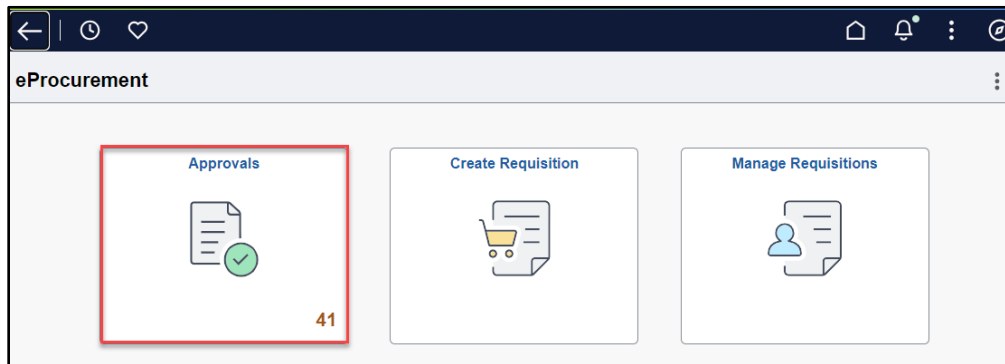
Navigation:

Select **Core-CT Financials**

Click the **eProcurement** tile




Click the **Approvals** tile



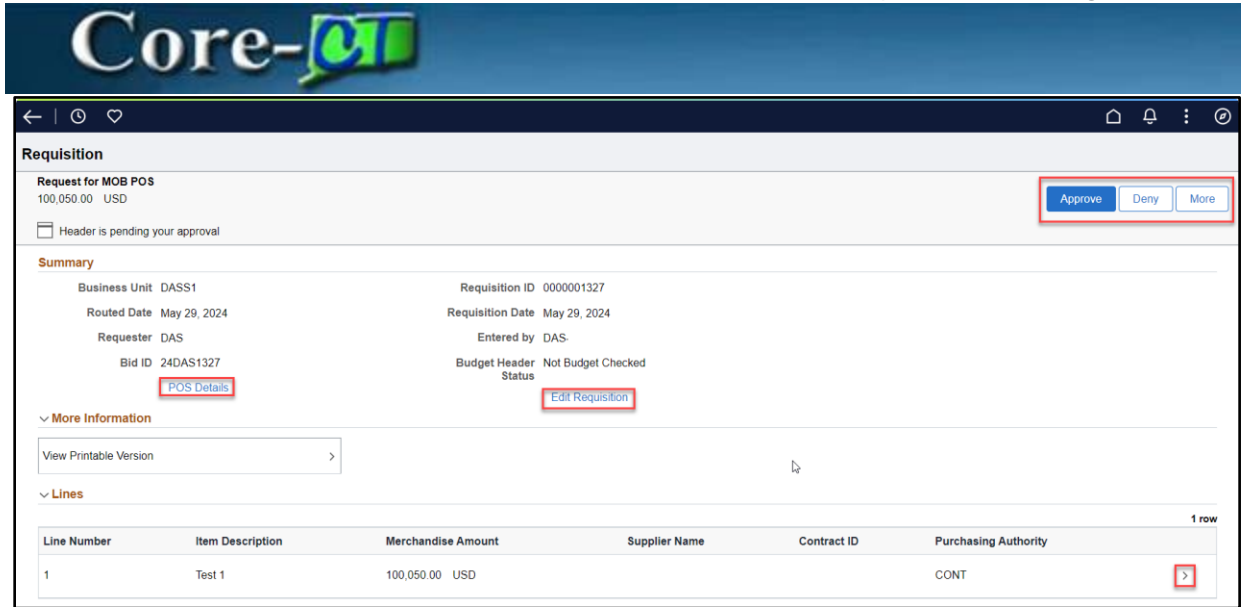


Pending Approvals displays

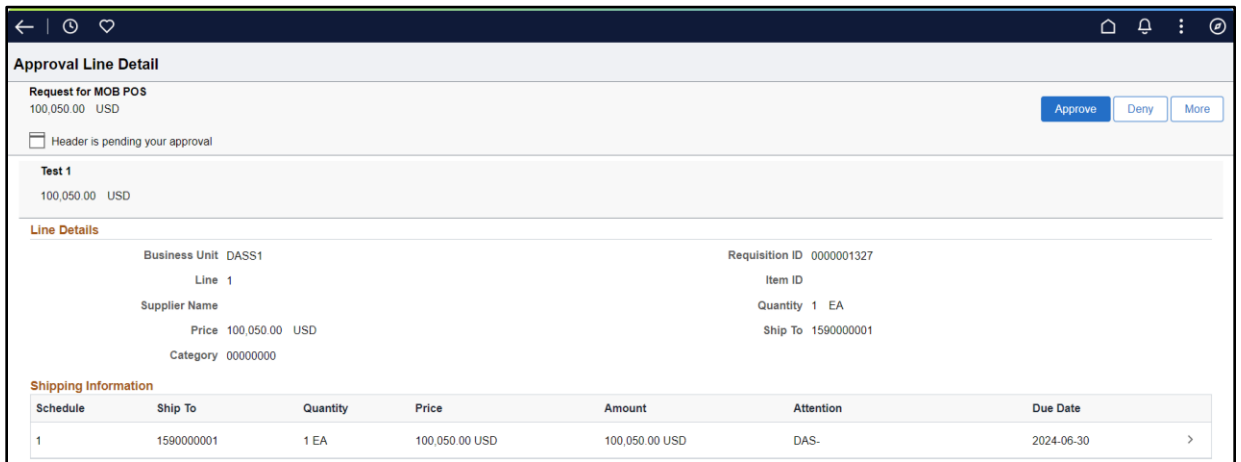
Requisition	Amount	Requester	From	Date Period	Priority
DASM1 / 0000008727 / DAS-	0.00 USD	/ Procurement Acquisition Suppor			Req Amount Approver 1 Routed 11/07/2023
DOTM1 / 0000197139 / DOT	0.00 USD	/ Bituminous Concrete Materials	DEPT OF TRANSPORTATION		DAS-BID Approver Routed 11/09/2023
DDSM1 / 0000006973 / DDS-	0.00 USD	/ Pharmacy Bid With IV Therapy			DAS-BID Approver Routed 11/21/2023
MILM1 / 0000004130 / MIL-	0.00 USD	/ 248-24 SIMUNITON/EQUIPMENT	MILITARY DEPARTMENT		DAS-BID Approver Routed 11/22/2023
DASM1 / 0000008788 / DAS-	231.00 USD	/ testing123	C & C JANITORIAL SUPPLIES INC		Req Amount Approver 1 Routed 02/21/2024
DASM1 / 0000008789 / DAS-	0.96 USD	/ 01.01A Script	GRAINGER INDUSTRIAL SUPPLY		Req Amount Approver 1 Routed 02/22/2024

(You can filter the pending approvals by **Type, Requester, From, Date Period, and Priority** by clicking on the  filter icon)


1. Click on the Requisition to review its details
2. Review **Line Details** for Chartfield information by clicking on the arrow at the end of each line.
3. Review PSA_POS Details by Clicking on **POS Details** Link
4. Review Attachments by clicking on the **Header Comments and Attachments** box
5. **Approve, Deny, Pushback, Request Information, or Hold** by clicking the appropriate button
6. After reviewing all the information that is displayed on the requisition approval page, **click the arrow at the end of the line to View Line Details.**



approval line details example



7. Click on the **View Printable Version** box to view a printable version of the Requisition that displays Chartfields, Start and End dates, Budget Reference, dollar amount, etc.



Business Unit: DASS1		Requester: 160165		Status: Pending Approval	
Requisition: 0000001327		Requested By: DAS-		Currency: USD	
Requisition Name: MOB POS		Entered Date: 5/29/24		Requisition Total: 100,050.00	

Line: 1	Item Description: Test 1	Quantity: 1.0000	UOM: EA	Price: 100050.0000	Line Total: 100,050.00
					Line Status: Pending

Purchasing Authority: CONT
Line Comments:
 Start Date:05-30-2024End Date:06-30-2024

Ship Line: 1	Ship To: 1590000001	Address:	Shipping Quantity: 1.0000
Attention: DAS	Due Date: 06/30/2024	60 State St	Shipping Total: 100,050.00
Ship Via: COMMON	Freight Terms: FOB DEST	60 State St. Rear	
		Wethersfield Garage	
		Wethersfield CT 06109	
		United States	

Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Open	ACORE	1.0000	100.00	100,050.00	STATE	54030

Dept	Fund	Program	SID
DAS23364	22003	13006	40001

Open QTY	PC BU	Project	Open Amt
1.0000	NONPC	DAS_NONPROJECT	0.0000

GL Base Amount	Currency	Sequence	Capitalize
100,050.00	USD	0	N

8. Click on the **PSA/POS Details** Link to review the type of PSA/POS and the required forms associated with them.



Purchase of Service POS

Yes No Is this a requisition to execute a Request for Proposal (RFP)?

Yes No Has a Cost Benefit Analysis (CBA) been completed per §4e-16(a)?

Explain why a CBA is not required. Select "Yes" for all that apply:

Yes No Services are currently provided by a non-state entity

Yes No The contract is with a non-profit and the contract was in effect as of January 1, 2009

Yes No Services are new and not currently provided by any state employees

Yes No Has a Cost Effectiveness Evaluation (CEE) been completed per §4e-16(p)? If "Yes", keep on file for potential audits

Explain why a CEE is not required. Select "Yes" for all that apply:

Yes No The contract is with a non-profit

Yes No The contract was in effect as of January 1, 2009

Yes No This type of service cannot currently be provided by state employees

Yes No Is this request in accordance with your agency's current OPM-approved procurement plan?

Yes No Is this to establish a new contract for ongoing services?

If yes, provide the following information about the previous contract:

Contract ID	22DPH71705POS01
Contract Type	PON Noncompetitive
Supplier ID	0000010235
Supplier Name	YALE NEW HAVEN HOSPITAL
Begin Date	10/01/2022
End Date	09/30/2027
Maximum Amount	\$9,520,983.000
Years contracting w/ provider	2
Date of last RFP	11/29/2021

9. Click on **Header Comment and Attachments box** to review the comments and attachments relevant to the *entire* requisition.

Requisition Header Comments and Attachments

Business Unit MHAM1

Requisition ID 0000038142

Header Details

▼ **Comment 1**

Federal funding from SAMHSA for United Way to continue to provide 988 call center services in Connecticut.



10. Click on **Edit Requisition** to edit the request.

Requisition
 Request for MOB POS
 100,050.00 USD

Header is pending your approval

Summary

Business Unit	DASS1	Requisition ID	0000001327
Routed Date	May 29, 2024	Requisition Date	May 29, 2024
Requester	DAS	Entered by	DAS
Bid ID	24DAS1327	Budget Header Status	Not Budget Checked

[POS Details](#) [Edit Requisition](#)

More Information

[View Printable Version](#)

Lines

Line Number	Item Description	Merchandise Amount	Supplier Name	Contract ID	Purchasing Authority
1	Test 1	100,050.00 USD			CONT

11. Click on the item **hyperlink** to edit the item details

Edit Requisition

Continue Shopping Update Cart Checkout

Edit Shopping Cart for Requisition ID 0000001327
 1 item(s) to buy now.

Requisition Summary

Business Unit DASS1
 Requisition Name MOB POS
 Requester 160165
 Currency USD

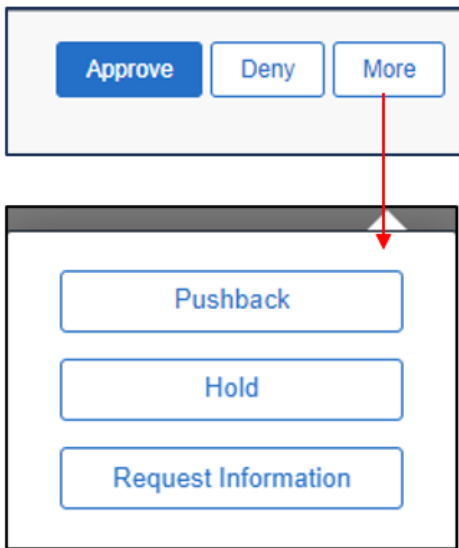
Item Description	Status	Price	Currency	Quantity
Test 1	Pending	100050.00	USD	1 Delete

Total 100050.00 USD



12. Enter Approver Comments (if any) and either Approve, Deny, Pushback, Request Information, or Hold Requisition or (**only Agency Submitter can Pushback**)

Approver Comments



ACTIONS & STATUSES

- **Approve** the requisition and it routes to the next approver in Workflow
 - Req. Status Pending
- **Deny** the requisition requires a comment and gets routed back to the PSA_POS Requester, who will receive an email and an *Alert* Notification to that effect.
 - Req. Status Denied, and workflow gets terminated
- **Request for Information** requires a comment and will send an email and an *Action* Notification to the PSA_POS Requester for additional information. The requester will access the requisition through the Notification Bell Action tab, or the email notification, make the necessary changes, and re-submit the requisition. The requisition will route



directly to the approver that requested information, who must approve for the workflow to continue.

- Req status is Pending

- **Hold** requires a comment and allows the approver to hold the requisition from continuing the approval workflow. It will send an email and an *Alert* Notification to the requester advising that the requisition is on hold. The requisition cannot move forward in workflow until the Approver that placed it on hold approves it .
 - Req. Status Pending

- **Pushback requires a comment** and will send an email and an *Action* Notification to the previous approver at the same approval step (i.e. Amount Approver 2 can Push back to Amount Approver 1)
 - Req. Status Pending

Once Approved, the requisition will be routed to the next Agency Approver and the Approvers step status will change to APPROVED on *View Approvals Chain*. (If you are the Agency Submitter, the next Approver will be OPM). The requisition status will change from Pending to Approved once all OPM approvers approve it.

***Editing the requisition will reinitiate workflow so that all stakeholders can view and approve the changes.**



Approval Chain ✕

Agency PSA_POS Approval

▼ 21MHA1005-8 United Way of Conn Pending

[Start New Path](#)

Agency PSA_POS Approval

Pending +

[Multiple Approvers](#)
Approves PSA_POS Requests >

Not Routed +

[Multiple Approvers](#)
PSA_POS to OPM if >= \$20K >

PSA_POS OPM APPROVAL

▼ 21MHA1005-8 United Way of Conn Awaiting Further Approvals

[Start New Path](#)

PSA_POS OPM APPROVAL

Not Routed +

[OPM-](#)
Approves PSA_POS >

Not Routed +

[OPM-](#)
Approves PSA_POS >

Not Routed +

[Multiple Approvers](#)
Final PSA_POS Approver >

Workflow has been initiated.



The Agency Service Approver must approve the requisition again.

Approval Chain

Agency PSA_POS Approval

21MHA1005-8 United Way of Conn Approved

Agency PSA_POS Approval

- Approved
- Approves PSA_POS Requests
05/07/24 2:55 PM
- Approved
- PSA_POS to OPM if >= \$20K
05/07/24 2:55 PM

Comments

approved at 05/07/24 - 2:55 PM

PSA_POS OPM APPROVAL

21MHA1005-8 United Way of Conn Pending

[Start New Path](#)

PSA_POS OPM APPROVAL

- Pending
- Approves PSA_POS
- Not Routed
- Approves PSA_POS
- Not Routed
- Multiple Approvers
Final PSA_POS Approver

- To view any PSA_POS requisition, Agency Approvers can navigate to: Core-CT Financials > eProcurement > Manage Requisition and search for a PSA_POS requisition using criteria. i.e. Req. number, Req. Type, Date Range, etc.



- EPM Reports can also be developed by request as needed for business requirements.

There are two (2) new roles for the Agency PSA_POS Approval process:

- CT AGY SERVICE APPROVER – Responsible for reviewing the PSA_POS information, editing requisition, if necessary, and approving or denying the request at the agency level.
- CT_F_A_PSA_POS_SUBMITTER – Responsible for submitting PSA_POS requisitions to OPM. Role is restricted to an agency's Deputy Commissioner, CFO, FAM, or other user with a similar level of authority.

The BIG PICTURE is a very integrated streamlined & cost saving approach. This initiative eliminates costs for licensing, maintenance, and consulting services for a standalone outdated system.

- A. Once the **Pre-Authorization** is completed, the agency user with the Req BID Contract Creator role will be able to convert the requisition into a Procurement Contract in Core-CT. All the information on the requisition will populate onto the Contract. It will remain in an OPEN status until the Supplier Contract is fully executed.
- B. The Supplier Contract can be created by clicking on the Create Document Link on the Procurement Contract. It will be compiled from all the legal documents in the contract library. The User will be able to collaborate with the Supplier and the AG's office using this new functionality to negotiate the Supplier's contract. It will be signed using DocuSign software within the system. Once fully executed the Procurement Contract will be approved.
- C. The end user will be able to create a purchase order by copying the Procurement Contract into the PO. The purchase order will go through the existing PO Approval workflow and be dispatched electronically to the supplier.
- D. Once services are received in the system a voucher is created and the supplier is paid.