



Types of Amendments: PSA_POS

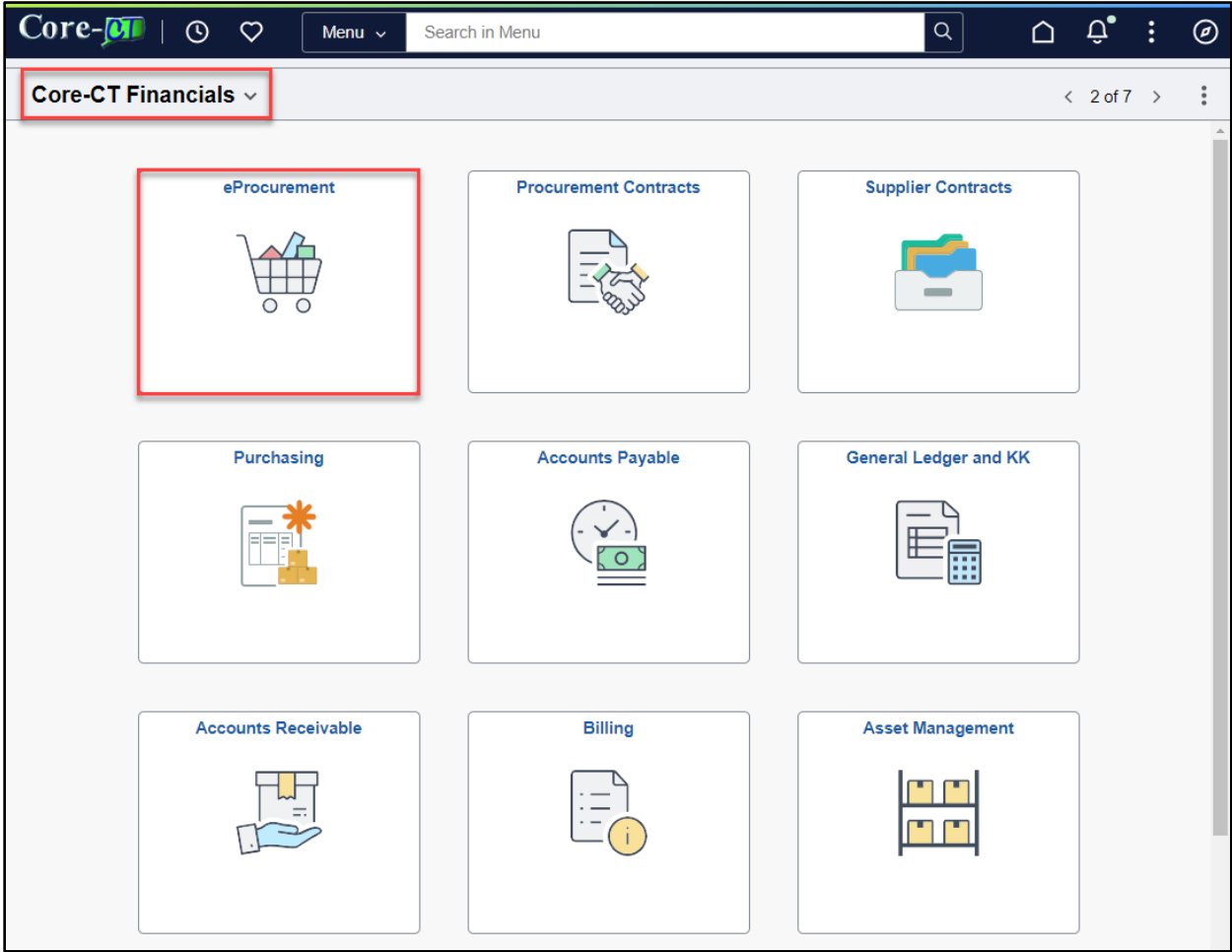
Navigation:

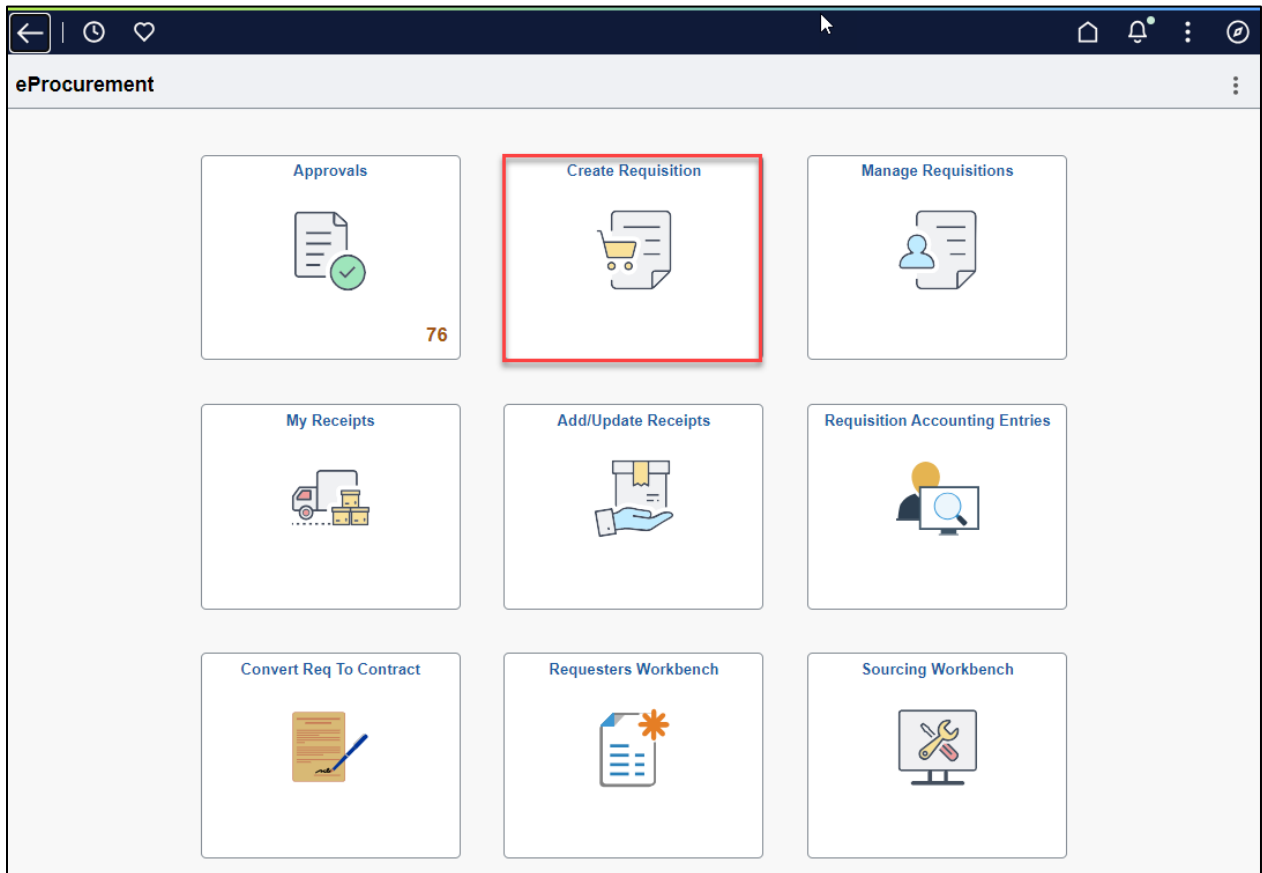


Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisition

OR

- Select **Core-CT Financials**
- Click the **eProcurement** tile
- Click **Create Requisition** tile





Procedure:

1. Enter **Business Unit** (if not defaulted).
2. Enter **Requisition Name**. (Important - if not entered, it will default to Req ID upon Submittal)
3. Select **Requisition Type** (PSA – Personal Service).



Requisition Defaults

Header Defaults

Business Unit: DASM1
Requisition Name: Test PSA
Requester: [Empty]
Requisition Type: PSA - Personal Service
Priority: Medium
Currency: USD

Line Defaults

Supplier ID: [Empty]
Supplier Location: [Empty]
Buyer: [Empty]
Category: [Empty]
Unit of Measure: [Empty]

Shipping Defaults

Ship To: 0640000558
Attention: [Empty]
Due Date: [Empty]

Distribution Defaults

SpeedChart: [Empty]

1 row

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information | Show All

Distribution Line	Percent	Location	GL Unit	Account
1	100	ACORE	STATE	[Empty]

4. Click on the **PSA Details** link.



Cancel **Requisition Defaults** Done

Header Defaults

Business Unit DASM1 Requisition Name Test PSA
Requester Requisition Type PSA - Personal Service
Priority Medium [PSA Details](#)
Currency USD

Line Defaults

Supplier ID Category
Supplier Location Unit of Measure
Buyer

Shipping Defaults

Ship To 0640000558 Attention
[Add One Time Address](#)
Due Date

Distribution Defaults

SpeedChart

Chartfields1 Chartfields2 Chartfields3 Details Asset Information Show All 1 row

Distribution Line	Percent	Location	GL Unit	Account
1	100	ACORE	STATE	

5. Click on the **Amendment PSA** link.



PSA Details

▼ **Select Type (Click the Link)**

- [Personal Service Agreement PSA](#)
COMPETITIVE Personal Services Agreement Greater than \$50,000
- [Waiver from Competitive Solicitation PSA](#)
NON-COMPETITIVE Personal Services Agreement Greater than \$50,000
- [Non-Competitive PSA](#)
Greater than \$50,000 fewer than 3 acceptable proposals received in response to an RFP
- [Amendment PSA](#)
Amendment to existing PSA

6. Answer all questions and select **OK**.



Amendment PSA ✕

Amendment to existing PSA ↔

Yes No Was a Cost Effectiveness Evaluation (CEE) completed per §4e-16(p) for the original contract? 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

No Yes Confirm that the agency has reviewed the original CEE and validated that it is still applicable OR has been updated based on changes in the expected contract costs.

Explain the reasons for not issuing a new Request for Proposal.

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

Original PSA

Contract ID 🔍 🗒

Contract Type

Supplier ID

Supplier Name

Begin Date

End Date

OPM Approval Number

Maximum Amount

Description of Service (Purpose, Scope, Activities, Outcomes)

Prior Amendments (List All Prior Amendments Individually)

Yes No 1 row

Prior Amendment Number ↕	Cost ↕	Start Date ↕	End Date ↕
<input type="text"/>	0.000	<input type="text"/>	<input type="text"/> + -

Yes No Is this PSA with an individual?

Yes No Is this PSA with a current State employee?

Yes No Was the cost of the original PSA more than \$50,000?

Yes No Is the cost of this amendment equal to or greater than the original cost of the PSA?

Yes No Does this amendment increase the cost of the original PSA to more than \$50,000?

Yes No Does this amendment extend the terms of the original PSA beyond a one-year period?

Yes No Is this the second or subsequent amendment to the original PSA?

8. Click **OK**.



PSA Details

▼ **Select Type (Click the Link)**

- [Personal Service Agreement PSA](#)
COMPETITIVE Personal Services Agreement Greater than \$50,000
- [Waiver from Competitive Solicitation PSA](#)
NON-COMPETITIVE Personal Services Agreement Greater than \$50,000
- [Non-Competitive PSA](#)
Greater than \$50,000 fewer than 3 acceptable proposals received in response to an RFP
- [Amendment PSA](#)
Amendment to existing PSA

- 9. Enter **Supplier ID**.
- 10. Enter **Buyer ID**.
- 11. Enter **Category**.
- 12. Enter **Unit of Measure**.



Requisition Defaults

Cancel Done

Header Defaults

Business Unit DASM1 Requisition Name Test PSA

Requester Requisition Type PSA - Personal Service

Priority Medium [PSA Details](#)

Currency USD

Line Defaults

Supplier ID 0000000155 Category 00000000

Supplier Location MAIN Unit of Measure HR

Buyer 085741

Shipping Defaults

Ship To 0640000558 Attention

[Add One Time Address](#)

Due Date

Distribution Defaults

- 13. Enter **Chartfields** – if defaulted, review and change as necessary.
- 14. Click **Done**.



Requisition Defaults [Cancel] [Done]

Header Defaults

Business Unit: DASM1
Requester: []
Priority: Medium
Currency: USD

Requisition Name: Test PSA
Requisition Type: PSA - Personal Service
[PSA Details](#)

Line Defaults

Supplier ID: 0000000155
Supplier Location: MAIN
Buyer: 085741
Category: 00000000
Unit of Measure: HR

Shipping Defaults

Ship To: 0640000558
Attention: []
[Add One Time Address](#)
Due Date: []

Distribution Defaults

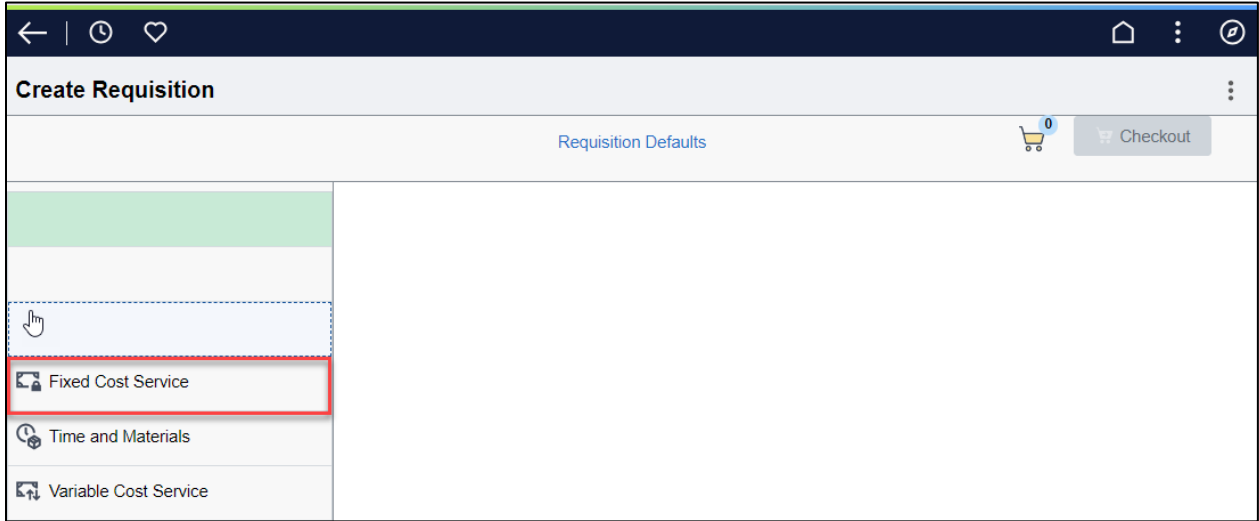
SpeedChart: []

1 row

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
Distribution Line	Percent	Location	GL Unit	Account	
1	100	ACORE	STATE	[]	[+]

15. Click **Fixed Cost Service** link – (or the link for the appropriate service.)

Note: The Category, Supplier ID, Supplier Name, and Unit of Measure fields are populated with values entered on the Requisition Defaults page.



- 16. Enter **Item Description**.
- 17. Enter **Value of Service**.
- 18. Enter **Start Date**.
- 19. Enter **End Date**.
- 20. Click **Add to Cart**.

Note: Repeat this process to add additional services to the requisition



Mobile application interface for "Create Requisition". The page title is "Create Requisition" and the sub-header is "Requisition Defaults". A shopping cart icon in the top right shows 0 items and a "Checkout" button. A sidebar on the left lists service types: "Fixed Cost Service" (selected), "Time and Materials", and "Variable Cost Service".

The main content area is titled "Fixed Cost Service" and contains three sections:

- Service Information:** Includes fields for *Service Description (Test Test Test), *Price (1000000), *Category (00000000), *Currency Code (USD), Start Date (07/31/2024), and End Date (08/31/2024).
- Supplier Information:** Includes fields for Supplier ID (0000000005), Supplier Location (MAIN), TOWN OF BARKHAMSTED, Quote Number, and Quote Date.
- Comment:** Includes a Comment Text field and three checkboxes: "Send Comment to Supplier", "Show Comment on Receipt", and "Show Comment on Voucher".

An "Add to cart" button is located at the bottom left of the form.

- 21. **Shopping Cart** displays in the top right.
- 22. Click **Checkout**.

Cart Overview

1 Item(s)
Order Total **1000000.00 USD**

[Edit Cart](#) [Checkout](#)

Test Test Test

1000000.00 USD * 1



23. Click **Submit**.

Create Requisition

Continue Shopping Save **Submit**

Checkout Requisition Defaults Order Total 1,000,000.00 USD

▼ Requisition Summary

Business Unit DASM1 Dept of Administrative Svcs Priority Medium

Requisition Name Test Requisition Type PSA - Personal Service

Requester Currency USD PSA Details

Header Comments

▼ Justification Comments

▼ Requisition Lines Overview

Select All Actions

Line	Description	Item ID	Quantity	Price	Currency	Total	Actions
1	Fixed Cost Service Test Test Test		1	1000000.00	USD	1,000,000.00 USD	ScheduleDetails >

Order Total 1,000,000.00 USD

24. Click **OK**.

A saved Requisition Type can't be changed. Are you sure you want to save a Requisition Type of PSA?
Click ok to this message if you are sure you have selected the proper Requisition Type, or Cancel to return and change the Requisition Type.

OK Cancel

The requisition has now been submitted for approval; you can search this at any time by calling up the Req ID in Manage Requisitions from the Fluid Dashboard: Core- CT Financials > eProcurement tile > Manage Requisitions tile.