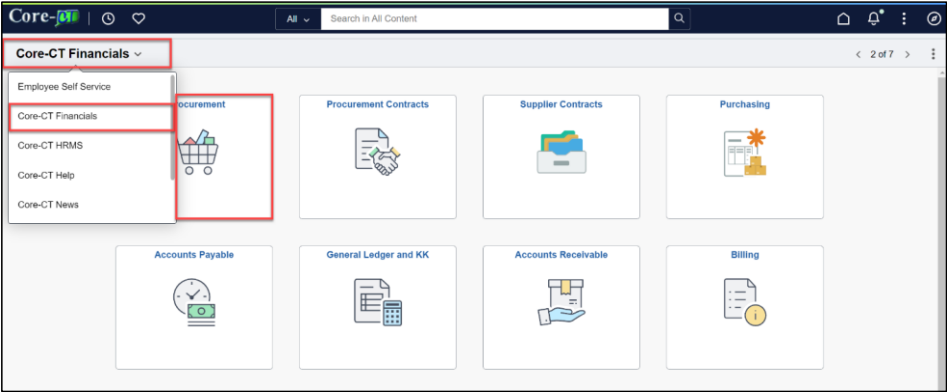




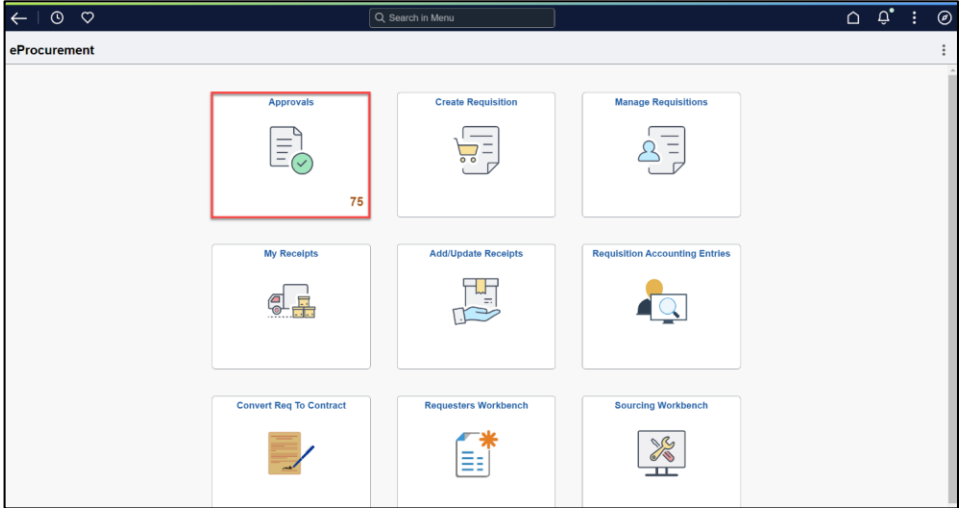
OPM PSA/POS Budget Approvals



Navigation:

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

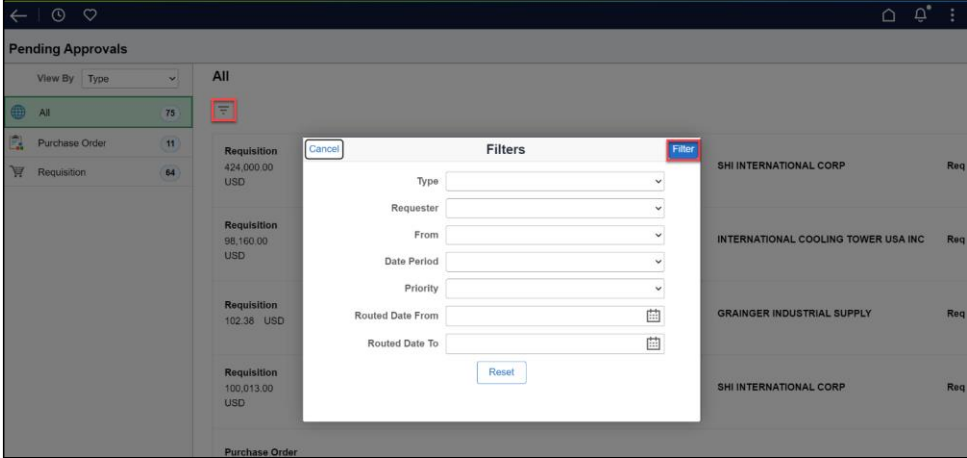


Click **Approvals**

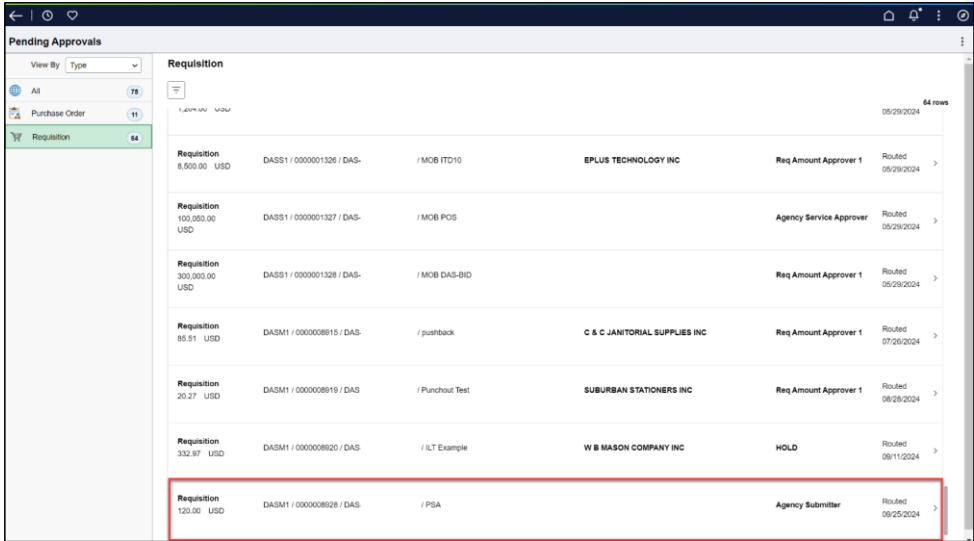


1. From the Pending Approvals page, select the filters button  and input the search criteria
2. Click  .

OPM PSA/POS Budget Approvals
eProcurement
Core-CT Financials
Updated as of: November 19, 2024



3. Click on the Requisition to open the transaction



OPM PSA/POS Budget Approvals
eProcurement
Core-CT Financials
Updated as of: November 19, 2024



4. View PSA/POS Details by Clicking on **PSA Details** Link.

Formatted: Left

The screenshot shows a web interface for a Requisition. At the top, it says "Requisition" and "Request for PSA Test" with a value of "120.00 USD". There are buttons for "Approve", "Deny", and "More". Below this, it indicates "Header is pending your approval".

Summary

Business Unit: DASM1	Requisition ID: 000008029	Obligation Amount: 0
Routed Date: October 2, 2024	Requisition Date: October 2, 2024	Oblig Start: 10/02/2024
Requester: DAS-	Entered by: DAS-	Oblig End: 06/30/2025
Card Number:	Budget Header Status: Not Budget Checked	

There is a red box around the "Edit Requisition" link.

More Information

- Header comments and attachments >
- View Printable Version >

Lines (1 row)

Line Number	Item Description	Merchandise Amount	Supplier Name	Contract ID	Purchasing Authority
1	PSA test	120.00 USD	TOWN OF ANDOVER	TEST_CONTRACT_8	CONT >

Below the table are sections for "Approver Comments" (with a text input field) and "Approval Chain" (with a dropdown arrow).



Personal Service Agreement PSA

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

Yes No Does the scope of work for this PSA include auditing services permissible by the state Auditors of Public Accounts?

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 Has the agency contracted out for these services during the preceding two years?

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

Contract ID	20SDE0124AA
Contract Type	PSC Competitive
Supplier ID	0000013614
Supplier Name	PULLMAN & COMLEY LLC
Begin Date	10/07/2020
End Date	09/15/2022
Maximum Amount	\$75,000.000

Yes No Does another State agency have the resources to provide these services?

Yes No Can these services be purchased on a cooperative basis with another State agency?

Yes No Will the services (irrespective of contractor) be ongoing?

5. View Header Comments and Attachments by Clicking the **Header Comments and Attachments** link:

OPM PSA/POS Budget Approvals
eProcurement
Core-CT Financials
Updated as of: November 19, 2024



Requisition
Request for PSA Test
120.00 USD

Header is pending your approval

[Approve](#) [Deny](#) [More](#)

Summary

Business Unit	DASM1	Requisition ID	000008929	Obligation Amount	0
Routed Date	October 2, 2024	Requisition Date	October 2, 2024	Oblig Start	10/02/2024
Requester	DAS-	Entered by	DAS-	Oblig End	06/30/2025
Card Number		Budget Header Status	Not Budget Checked		

[Edit Requisition](#)

More Information

- Header comments and attachments >
- View Printable Version >

Lines

Line Number	Item Description	Merchandise Amount	Supplier Name	Contract ID	Purchasing Authority
1	PSA test	120.00 USD	TOWN OF ANDOVER	TEST_CONTRACT_F	CONT

Approver Comments

Approval Chain >

Requisition Header Comments and Attachments

Business Unit DASM1
Requisition ID 000008929

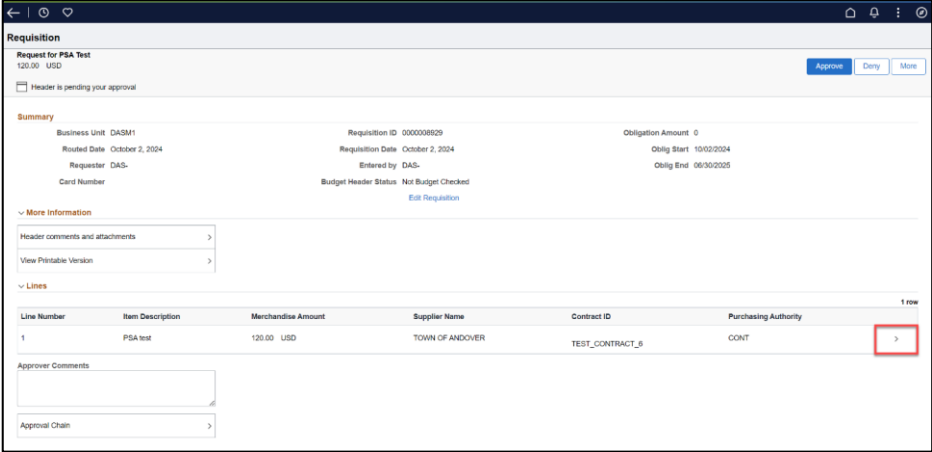
Header Details

Comment 1
Test Test Test

OPM PSA/POS Budget Approvals
eProcurement
Core-CT Financials
Updated as of: November 19, 2024



6. View **Line Details** by clicking the .



Requisition
Request for PSA Test
120.00 USD

Header is pending your approval

Summary

Business Unit: DASM1	Requisition ID: 000008929	Obligation Amount: 0
Routed Date: October 2, 2024	Requisition Date: October 2, 2024	Oblig Start: 10/02/2024
Requester: DAS-	Entered by: DAS-	Oblig End: 06/30/2025
Card Number:	Budget Header Status: Not Budget Checked	

More Information

- Header comments and attachments
- View Printable Version

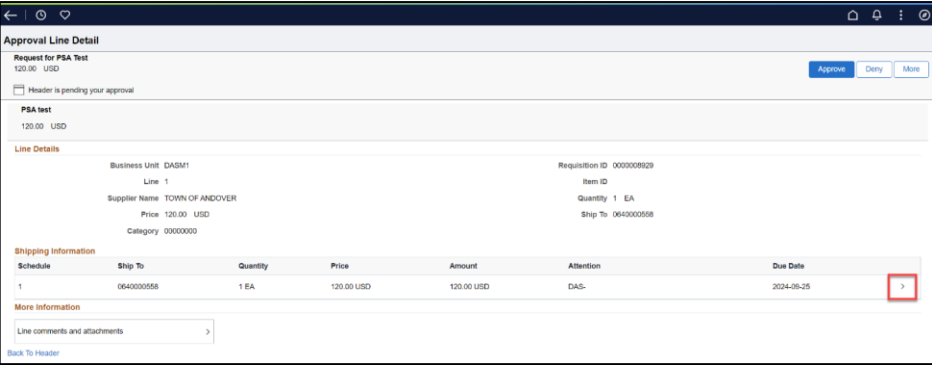
Lines

Line Number	Item Description	Merchandise Amount	Supplier Name	Contract ID	Purchasing Authority
1	PSA test	120.00 USD	TOWN OF ANDOVER	TEST_CONTRACT_8	CONT

Approver Comments

Approval Chain

7. On the Line details click the  to view the Distributions for the line



Approval Line Detail
Request for PSA Test
120.00 USD

Header is pending your approval

PSA test
120.00 USD

Line Details

Business Unit: DASM1	Requisition ID: 000008929
Line: 1	Item ID:
Supplier Name: TOWN OF ANDOVER	Quantity: 1 EA
Price: 120.00 USD	Ship To: 064000558
Category: 00000000	

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	064000558	1 EA	120.00 USD	120.00 USD	DAS-	2024-06-25

More Information

- Line comments and attachments

Back To Header

8. Close window.

OPM PSA/POS Budget Approvals
 eProcurement
 Core-CT Financials
 Updated as of: November 19, 2024



Distributions

Fluid Approval Distribution

Line 1
 Schedule 1
 Item Description PSA test
 Merchandise Amount 120.00 USD
 Quantity 1.0000 EA

Distribution Line	Requisition Quantity	OL Business Unit	Merchandise Amount	Currency Code	Fund Code	Department	SLID	Program Code	Account	Budget Reference	ChartField 1	ChartField 2	ChartField 3	PC Business Unit	Project	Activity	Source Type	Case
1	1.0000	STATE	120.00	USD	11000	DAS23920	10020	00000	54030					NONPC	DAS_NONPROJECT			

9. Click the back button to access the **View Printable version** link; when done, close window

Requisition
 Request for PSA Test
 120.00 USD

Approve Deny More

Header is pending your approval

Summary

Business Unit: DASM1	Requisition ID: 000008929	Obligation Amount: 0
Routed Date: October 2, 2024	Requisition Date: October 2, 2024	Oblig Start: 10/02/2024
Requester: DAS-	Entered by: DAS-	Oblig End: 09/30/2025
Card Number	Budget Header Status: Not Budget Checked	

[Edit Requisition](#)

More Information

Header comments and attachments >

View Printable Version >

Lines 1 row

Line Number	Item Description	Merchandise Amount	Supplier Name	Contract ID	Purchasing Authority
1	PSA test	120.00 USD	TOWN OF ANDOVER	TEST_CONTRACT_6	CONT

Approver Comments

Approval Chain >

10. A Printable version of the requisition will open.

OPM PSA/POS Budget Approvals
 eProcurement
 Core-CT Financials
 Updated as of: November 19, 2024



Business Unit: TECM1	Requester: 159710	Status: Pending Approval
Requisition: 0000001004	Requested By: TEC-DINardi Renee T	Currency: USD
Requisition Name: 24TEC0038 RFP_Out Lbr Counsel	Entered Date: 5/22/24	Requisition Total: 125,000.00

Header Comments:
 Special Note: The previous contract (20SDE0124 Pullman and Comely) was executed on our behalf when we were part of CSDE. This RFP is to solicit competitive bids for similar services.
 Outside Labor Counsel is needed to represent CTECS management at collective bargaining with both the State Vocational Federation of Teachers and American Federation of School Administrators (SVFT and AFSA). The current Collective Bargaining Agreements (CBAs) are due to expire in 2025, with a statutory process for negotiating successor CBAs established by the State Employee Relations Act. Office of Labor Relations (OLR) does not represent CTECS with SVFT and AFSA and the agency has always engaged outside labor counsel to lead the negotiations on behalf of the agency.

Line: 1	Item Description: RFP Outside labor counsel services	Quantity: 1.0000	UOM: EA	Price: 125000.0000	Line Total: 125,000.00	Control_ID:
					Line Status: Pending	PO_Auth: CONT
					CM Num:	

Line Comments:
 Start Date: 11-01-2024End Date: 10-31-2027**User Comments:** RFP for legal services to address union agreements and issues- outside labor relation counsel services** School years 24-25, 25-26, 26-27, and beginning of 27-28**Start Date: 11-01-2024**End Date: 10-31-2027**User Comments:** RFP for legal services to address union agreements and issues- outside labor relation counsel services** School years 24-25, 25-26, 26-27, and beginning of 27-28

Ship Line: 1	Ship To: 0540000503	Address:	Shipping Quantity: 1.0000
Attention: TEC-DINardi Renee T	Due Date: 10/31/2027	39 Woodland Street	Shipping Total: 125,000.00
Ship Via: COMMON	Freight Terms: FOB DEST	Hartford CT 06105	
		United States	

Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Open	ACORE	1.0000	100.00	125,000.00	STATE	61290
		Dept	Fund		Program	SID	
		TEC64605	11000		84080	10020	
		Open QTY	PC BU	Project		Open Amt	
		0.0000	NONPC	TEC000000000007		125000.0000	
		GL Base Amount	Currency	Sequence	Capitalize		
		125,000.00	USD	0	N		

11. Select **Approval Chain** to see the stages within the approval process.

Requisition
 Request for PSA
 120.00 USD

Approve Deny More

Header is pending your approval

Summary

Business Unit: DASM1	Requisition ID: 000008928
Routed Date: September 25, 2024	Requisition Date: September 25, 2024
Requester: DAS	Entered by: DAS
Bid ID: 24DAS8928	Budget Header Status: Not Budget Checked

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

More Information
[View Printable Version](#)


Lines

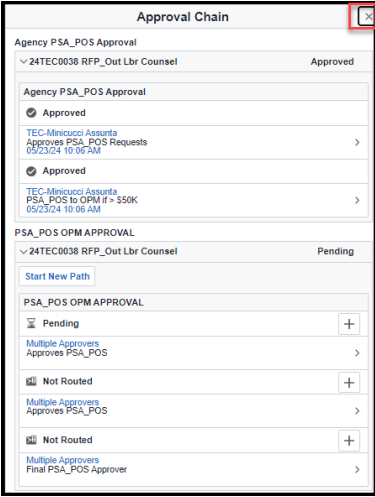
Line Number	Item Description	Merchandise Amount	Supplier Name	Contract ID	Purchasing Authority
1	PSA test	120.00 USD			CONT

Approver Comments

Approval Chain

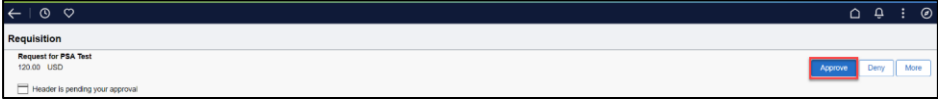


12. This will display the Approval Chain along with the status of the requisition at each stage. Click  to close the Approval Chain



13. Based on the approver's review and accuracy of the requisition, the approver can perform the following actions. Click **Approve** to approve the requisition.

- a. A pop-up window to enter Approver Comments will appear.
 - i. Comments are *optional* for the **Approve** action.
- b. Enter Comments if necessary and Click **Submit**.
- c. The requisition drops from the approver's list, and the next level of approvers will get an Action notification.
- d. Once the requisition is fully approved, the Requester will receive an *Alert* notification and an email.



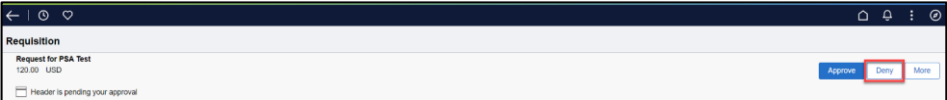


Cancel **Approve** Submit

You are about to approve this request.

Approver Comments

14. Click **Deny** to deny the requisition.



- a. A pop-up window to enter Approver Comments will display.
- b. Comments are *required* for the **Deny** action

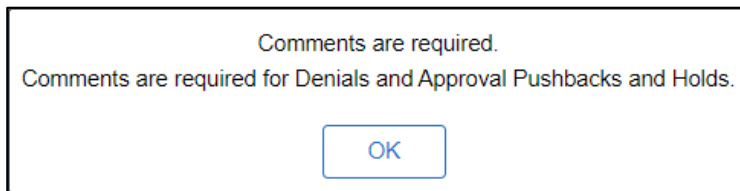
Cancel **Deny** Submit

You are about to deny this request.

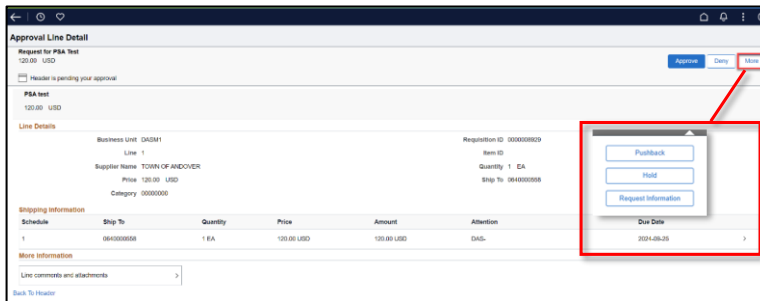
Approver Comments



- c. If comments are required on an action and not entered, an error message will display.



- 15. Enter Comments and Click **Submit**.
- 16. The workflow will stop, and the requisition will be terminated.
- 17. The Requester will receive an *Alert* notification and an email.
- 18. Click **More** to pull up more actions for the requisition.



- 19. Click **Pushback** to send requisition back to the previous level of Amount Approvers if any.
 - a. A pop-up window to enter Approver Comments will display.
 - b. Comments are *required* for the **Pushback** action.
 - c. The previous Amount Approver will receive an *Action* notification and an email.
 - d. The Requester will receive an *Alert* Notification and an email.



Or

20. Click **Hold** to place requisition on hold.
 - a. A pop-up window to enter Approver Comments will display.
 - b. Comments are *required* for the **Hold** action
 - c. The requisition will drop to the bottom of the list for the Approver who placed it on hold, and it will be removed from the rest of the approvers' list that follow.
 - d. The Requester will receive an *Action* notification and an email.

21. Click **Request Information** to request more information on the requisition.
 - a. A pop-up window to enter Approver Comments will display.
 - b. Comments are *required* for the **Request Information** action
 - c. The Requester will receive an *Action* notification and an email
 - d. Enter Comments and Click **Submit**.

A screenshot of a "Request Information" dialog box. The dialog has a title bar with "Request Information" in the center, a "Cancel" button on the left, and a "Submit" button on the right. The main content area contains the text "You are about to request more information for this request." followed by a section titled "Approver Comments" with a text area containing the text "Comments are Required".

- 22. Approve and Deny actions will bring the user back to their approval list.
- 23. Any of the actions under More will keep the requisition on the screen.

24. **Approve** the requisition and it routes to the next approver in Workflow

- a. **Requisition Status:** Pending

25. **Deny** the requisition requires a comment and gets routed back to the PSA_POS Requester

- a. **Requisition Status:** Denied

26. **Hold** will send a message to the PSA_POS Requester requiring additional information. The requester will access the requisition, make the necessary changes, and re-submit the requisition. The requisition will route directly to the approver that placed it on Hold. The requisition cannot move forward in workflow until the OPM Approver takes it off HOLD and approves it once the required documentation has been added.

- a. **Requisition Status:** Pending

Once Approved, the requisition will be routed to the next OPM Approver and the Approvers step status will change to APPROVED on the Approval Chain.

To view any PSA_POS document, OPM Approvers, using the Fluid Dashboard 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.
Financial Reports can also be developed by request as needed for business requirements.

There are three (3) roles for this process:

- OPM Budget Approver 1 – OPM Budget Analyst and backup responsible for approving PSA_POS requisitions
- OPM Budget Approver 2 – OPM Budget Section Director responsible for approving PSA_POS requisitions
- OPM Final Budget Approver - OPM Budget Section Director responsible for approving PSA_POS requisitions