



Types of Requisitions: PSA_POS

Navigation:



Nav Bar

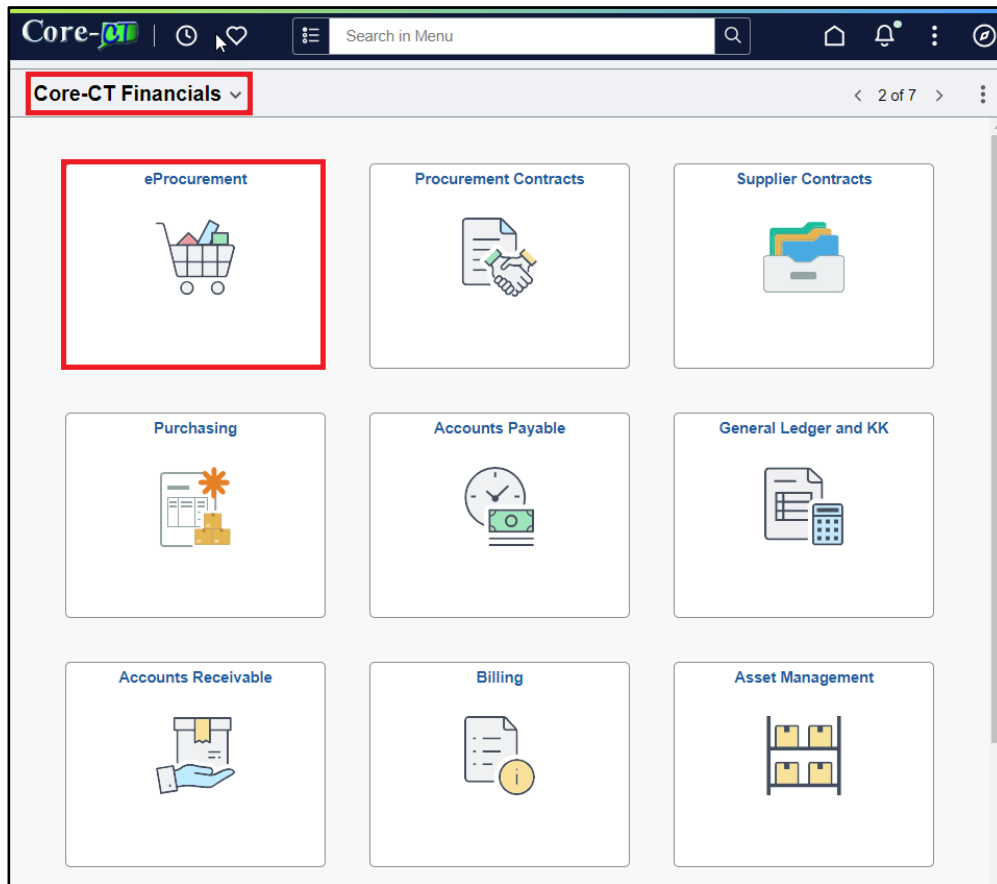
Nav Bar > Menu > Core- CT Financials > eProcurement > Create Requisition

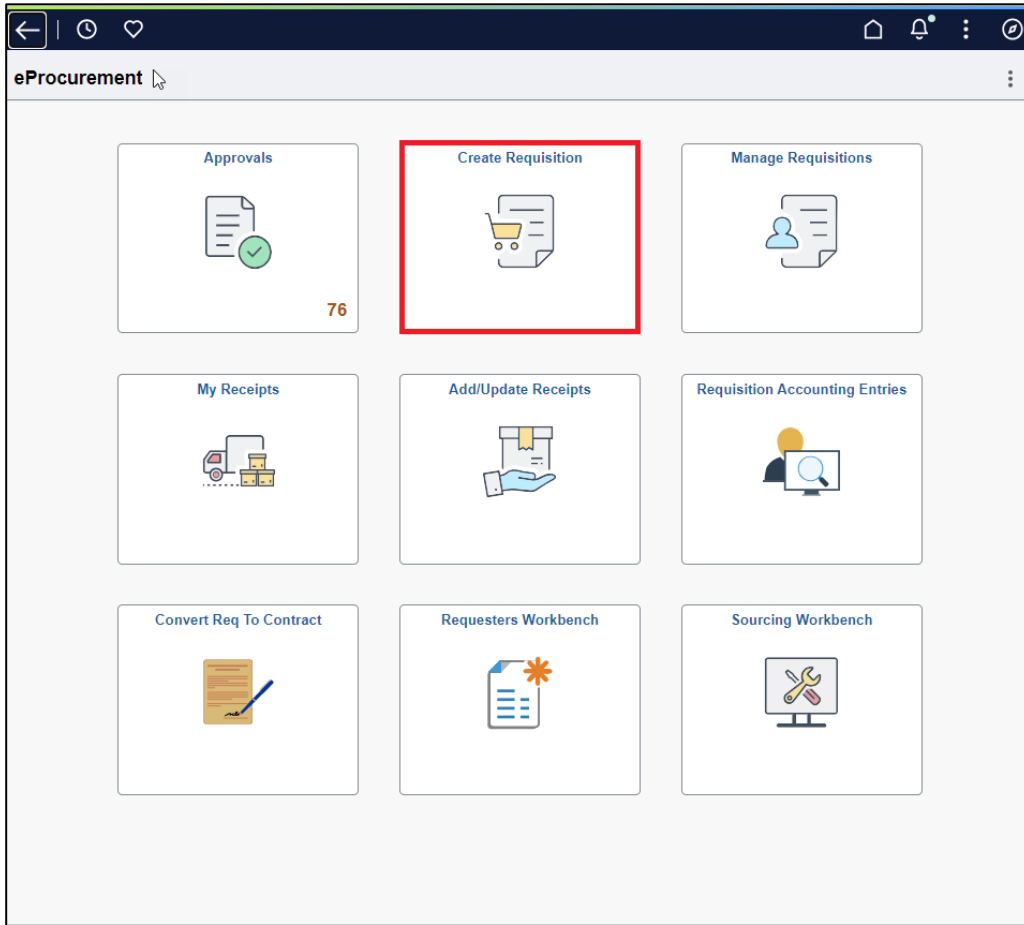
OR

Select **Core-CT Financials**

Click the **eProcurement** tile

Click **Create Requisitions** tile







Procedure:

1. Enter **Business Unit**, if one is not defaulted at sign in
2. Enter the **Requisition Name**
3. **PSA – Personal Service** for the Requisition Type
4. Click on the **PSA Details** Link

Distribution Line	Percent	Location	GL Unit	Account
1	100	ACORE	STATE	

5. Click on [Hyperlink](#) for **Personal Service Agreement PSA – COMPETITIVE Personal Services Agreement** Greater than \$50,000.



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 click **OK**



Personal Service Agreement PSA ×

COMPETITIVE Personal Services Agreement Greater than \$50,000

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

Contract Type

Supplier ID

Supplier Name

Begin Date

End Date

Maximum Amount

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?

7. Click **OK**



PSA Details

▼ **Select Type (Click the Link)**

- [Personal Service Agreement PSA](#)
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- 8. **Enter the Supplier ID**
- 9. **Buyer**
- 10. **Category**
- 11. **Unit of Measure**

▼ **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	000000088	Category	00000000
Supplier Location	MAIN	Unit of Measure	HR
Buyer	085741		

Shipping Defaults



- 12. Enter Chartfields – If the chartfields are defaulted skip this step.
- 13. Click **Done**

- 14. Click **Fixed Cost Service** link

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

- 15. Enter **Priority of the requisition** (High, Med, Low) and then the **Item Description**
- 16. Enter **Value of Service**
- 17. Enter **Start Date**
- 18. Enter **End Date**
- 19. Click **Add to Cart**



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Create Requisition

Requisition Defaults 🛒⁰ | Checkout

Fixed Cost Service

Service Information

*Service Description	Med - Test		
*Price	1000	*Currency Code	USD
*Category	00000000		
Start Date	07/30/2024	End Date	

Supplier Information

Supplier ID	000000088	Supplier Location	MAIN
NAUGATUCK TOWN TREASURER			
Quote Number		Quote Date	

Comment

Comment Text

Send Comment to Supplier
 Show Comment on Receipt
 Show Comment on Voucher

[🛒 Add to cart](#)

20. Review the information entered
Note: *Do this process for additional services you wish to place on your requisition.*

21. Click [🛒 Checkout](#)

22. Click on the **Line Comments** box



Create Requisition

Continue Shopping Save Submit

Requisition Defaults Order Total 1,000.00 USD

Requisition Summary

Business Unit DASM1 Dept of Administrative Svcs Priority Medium

Requisition Name Test PSA Requisition Type PSA - Personal Service

Requester Currency USD [PSA Details](#)

Header Comments

Justification Comments

Requisition Lines Overview

Select All Actions

1 row

Line	Description	Quantity	Price	Currency	Total	Actions
Line 1	Fixed Cost Service Med - Test	1	1000.00	USD	1,000.00 USD	ScheduleDetails Line Comments Delete

Order Total 1,000.00 USD

- 23. Add a **Comment**
- 24. Click on **Add Attachment**



Cancel Requisition Line Comments and Attachments Done

Comments + -

Use Standard Comments

Comment Text ****Start Date:07-30-2024**End Date:07-31-2024**

Send to Supplier No

Show at Receipt No


Show at Voucher No

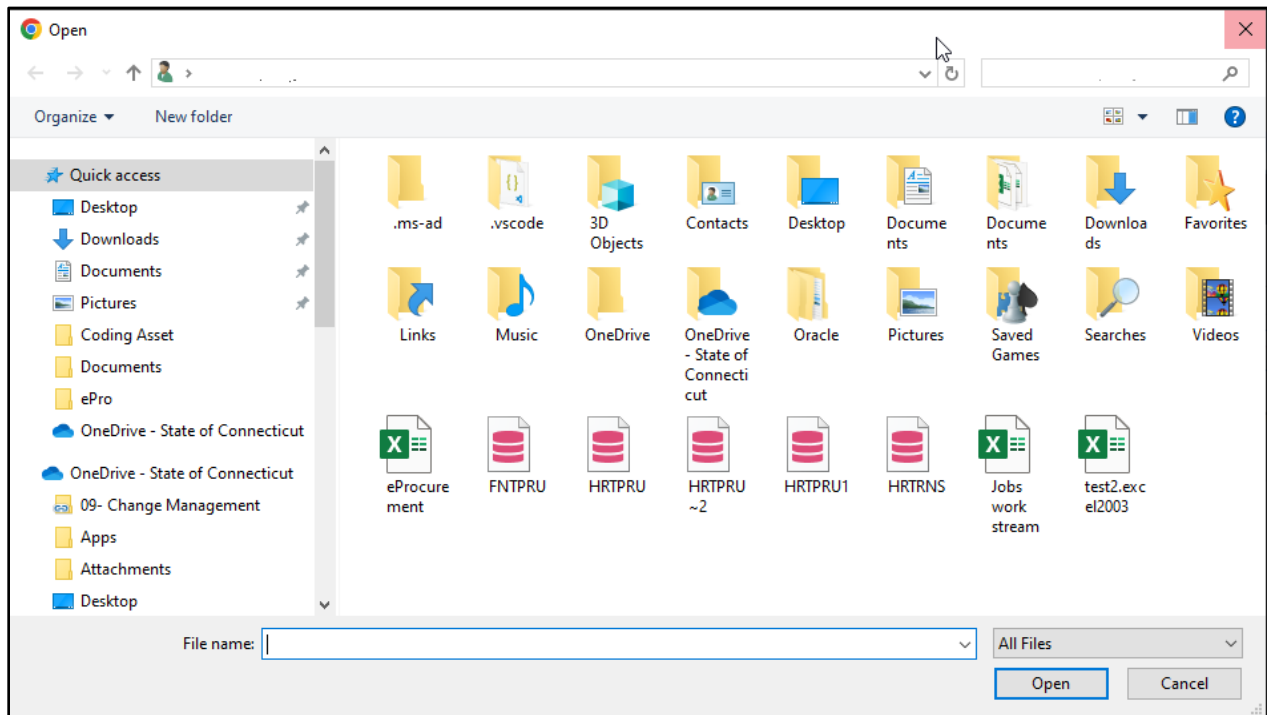
Add Attachment

25. Click on **My Device** and find a file to attach

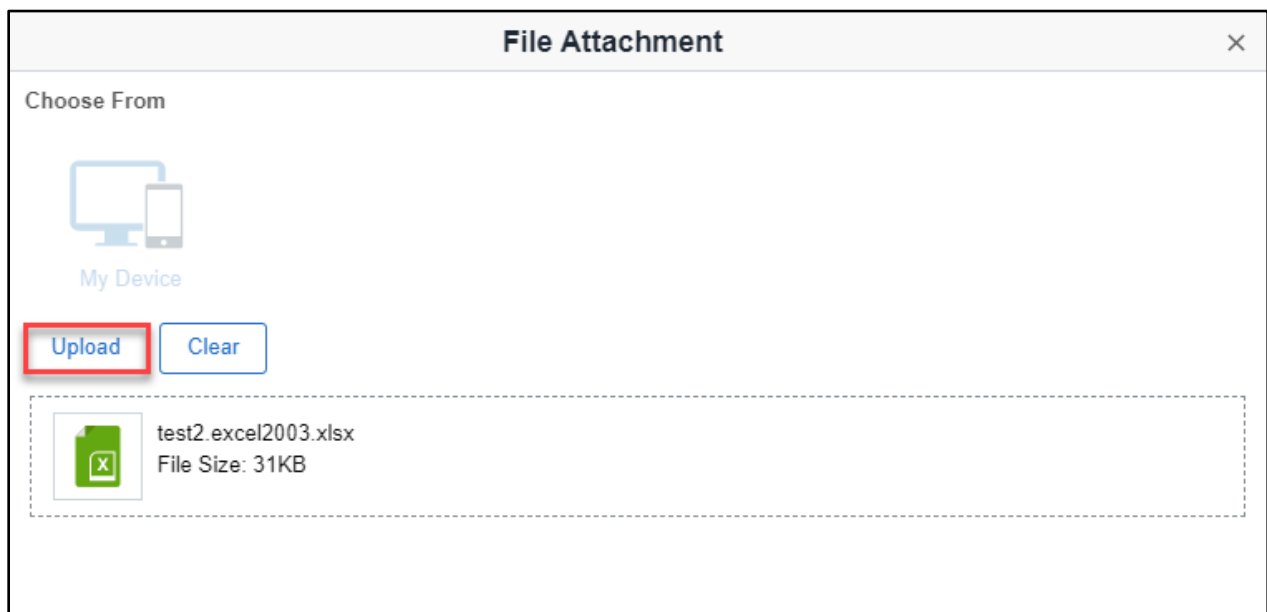
File Attachment x

Choose From

 My Device



26. Click **Upload**







27. Click **Done**

Done

Choose From


My Device

 test2.excel2003.xlsx
File Size: 31KB

Upload Complete

28. Click **Done**



Cancel

Requisition Line Comments and Attachments

Done

Comments + -

Use Standard Comments

Comment Text

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Attachments 1 row

View ↑↓	Attachment ↑↓	Send to Supplier	↑↓
1 View	test2.excel2003.xlsx	<input type="checkbox"/> No	-

29. Enter the Budget Reference (Bud Ref) information in the Approval Justification field.



Create Requisition

Continue Shopping Save Submit

Requisition Defaults Order Total 1,000.00 USD

Requisition Summary

Business Unit: DASM1 Dept of Administrative Svcs
Priority: Medium
Requisition Name: Test PSA
Requisition Type: Requisition
Requester: Requester
Dispatch Method: Print
Currency: USD
Obligation Amount:
Card Number:
Expiration Date:
Use Procurement Card: No

Justification Comments

Line 1 - Budget Referecl

Requisition Lines Overview

Select All Actions

Item ID	Quantity	Price	Currency	Total	
Line 1 Fixed Cost Service Med - Test Supplier NAUGATUCK TOWN TREASURER	1	1000.00	USD	1,000.00 USD	ScheduleDetails >

Line Comments Delete

Order Total 1,000.00 USD

30. Click **Submit**



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Create Requisition

Continue Shopping Save Submit

Requisition Defaults

Order Total 1,000.00 USD

Requisition Summary

Business Unit: DASM1 Dept of Administrative Svcs	Priority: Medium ▼
Requisition Name: <input type="text" value="Test PSA"/>	Requisition Type: Requisition ▼
Requester: <input type="text"/>	Dispatch Method: Print ▼
Currency: USD	Obligation Amount: <input type="text"/>
<input type="button" value="Header Comments"/>	Card Number: _____ ▼
	Expiration Date: <input type="text"/>
	Use Procurement Card: <input type="checkbox"/> No

Justification Comments

Line 1 - Budget Reference

Requisition Lines Overview

Select All Actions ⌵

		Quantity	Price	Currency	Total	
1 row						
<input type="checkbox"/>	Line 1 Fixed Cost Service Med - Test Item ID <input type="text"/> Supplier NAUGATUCK TOWN TREASURER	1	1000.00	USD	1,000.00 USD	<input type="button" value="ScheduleDetails"/> >
	<input type="button" value="Line Comments"/> <input type="button" value="Delete"/>					

Order Total 1,000.00 USD

- The requisition has been submitted to PSA_POS workflow and is in **pending status**.
- The requisition number displays on the header.
- The Bid/Contract ID starts with the year, agency acronym & requisition number. This field is editable when converting the req to a contract.
- Default for this requisition is Amount Only. If you need to change to QTY un-check the Amount Only Box in the line details.

(When the requisition is converted into a contract, the Contract ID will have a suffix added to it of either PSA-01 or POS-01 depending upon which requisition type was chosen). Here, the agency also has the ability to change the contract ID to something meaningful to them.