

Office of Policy & Management (OPM)

Personal Service and Purchase of Service Contract Agreement Policy

Core-CT– eProcurement Requisition

Effective October 1, 2019, the eProcurement requisition in Core-CT will be the vehicle for submitting Personal Service Agreements (PSA) or Purchase of Service (POS) requests to OPM for approval. This functionality is replacing the current OPM Request (Jamie) System.

Access to eProcurement will be made through the Core-CT Agency Security Liaisons who will submit the CO-1092 to Core-CT Security. http://www.core-ct.state.ct.us/security/fin_sec.html.

OPM has defined the requirements for requesting approval for PSA or POS Agreements.

Procurement Standards for seeking OPM approval

- Requests to conduct an RFP, must be submitted to OPM for approval if the RFP amount is greater than \$50,000 or the contract term is more than one year.
- Contracts resulting from an RFP must be submitted to OPM for approval if there are fewer than three responses regardless if it was previously submitted prior to the bid process.
- Sole source requests for a contract, must be submitted to OPM for approval if the contract amount is greater than \$20,000 or the contract term is greater than one year.
- PSA and POS contract amendments must be approved by OPM when:
 - a. an original contract amount is more than \$50,000 or original term is more than one year;
 - b. the amendment results in a cost of 100% or more than the original contract amount;
 - c. the amendment brings the total contract amount over \$50,000 or extends the contract period longer than one year; or
 - d. this is the second or subsequent contract amendment

Process

Users must create a PSA_POS requisition in the Core-CT eProcurement module by choosing the appropriate requisition type. The PSA_POS Details Link will display the forms that are currently used in the Jamie system. It is recommended that agencies include the supplier name in the requisition name field to easily identify each transaction.

Agencies should reach out to their assigned OPM Budget Analyst to discuss expectations regarding PSA & POS contract requests. Complete and thorough documentation will expedite this process. Strong justifications must be clearly defined and warranted.

The **Budget Reference** should be entered in the Justification field. Example: **Budget Ref. 2020**

The **Priority** should be entered in capital letters on the first line of the requisition before the description. (HIGH, MED, LOW)

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Agencies may use the Justification or Comments field on the requisition header to add pertinent details for the request. Separate documents can be added as attachments in the requisition comments and attachments field.

Amendments with the **prior approval** of OPM, which require approval on multiple contracts (e.g., a 1% addition or reduction or to enter into the same contract for a particular service type with multiple contractors) may be submitted as one requisition. A spreadsheet listing the name of the contractors, service type, term, amount and other relevant information must be attached to the requisition. Once amendments are approved, the user must manually update the existing supplier contract in Core-CT.

Requests for any PSA or POS under \$20,000 will be routed to internal agency approvers.

A PSA or POS request is, by statute, approved if it is not acted on within 15 days. However, the use of the “**hold**” functionality by a budget analyst, budget section chief or executive finance director or designee **shall constitute a disapproval of the request** until such time as further supporting information is available and/or final action, if any, is taken with respect to the request.

Training

Training classes for the new OPM PSA_POS process have been scheduled for September 2019 and will be provided by Core-CT.

Job Aids are posted on the Core-CT website for reference: <http://www.core-ct.state.ct.us/financials/>

Core-CT Help Desk

Please direct all system inquiries to the FootPrints Help Desk Application for Core-CT using the following link: <http://footprints.ct.gov/footprints>

To keep current with Core-CT subscribe to: [Daily Mail: Core-CT Communication Bulletins](#)

Reporting

A query has been created that agencies can schedule to identify all PSA_POS requests that have been approved by OPM. Agencies can add users to receive an email each day to access the report.

Query Name: CT_REQ_POS_PSA_STATUS

Instructions on scheduling/maintaining the report will be reviewed in the training sessions and a job aid will be posted to the Core-CT website.

OPM Policy Questions

Please direct any policy related questions to Valerie Clark at Valerie.clark@ct.gov or 860-418-6313 or contact your assigned OPM Budget Analyst.

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