



Types of Amendments: PSA_POS

Navigation:

eProcurement > Requisition

Procedure:

1. Enter **Business Unit** (if not defaulted).
2. Enter **Requisition Name**.
3. Select **Requisition Type** (PSA – Personal Service).

Define Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv
Requester: Jackson-LeeTia MHA-Jackson-Lee Tia
*Currency: USD

Requisition Name: PSA Amendment
Priority: Medium
Requisition Type: PSA - Personal Service

Default Options ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace

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

My HR Finance Core-CT Help STARS

Define Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv
Requester: Jackson-LeeTia MHA-Jackson-Lee Tia
*Currency: USD

Requisition Name: PSA Amendment
Priority: Medium
Requisition Type: PSA - Personal Service

[PSA Details](#)

Default Options ?

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

OK Cancel

6. Answer all questions

7. Click **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

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:

Begin Date: End Date:

Maximum Amount:

OPM Approval No:

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

Prior Amendments Yes No

(List All Prior Amendments Individually)

Prior Amendment Number	Cost	Start Date	End Date
	0.000		

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?

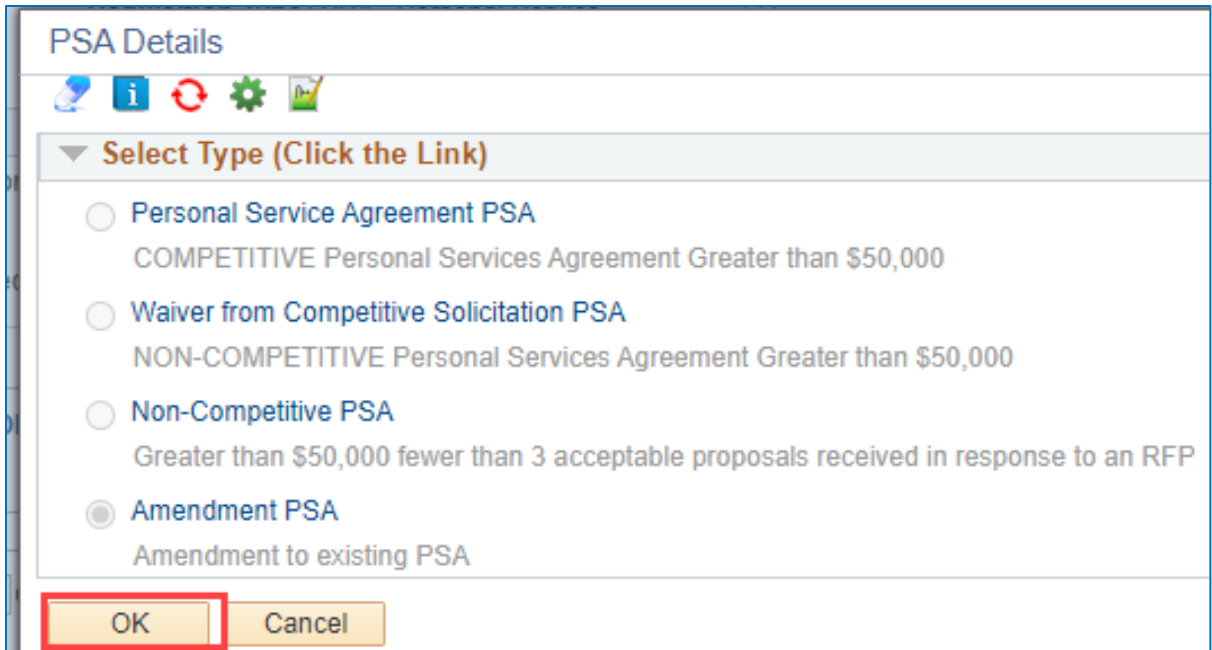
Yes No Does this amendment increase the original PSA cost to more than \$50,000?

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?

OK Cancel

8. Click **OK**.



The image shows a dialog box titled "PSA Details". At the top, there are several icons: a hand, an information icon, a refresh icon, a gear, and a document icon. Below the icons is a section titled "Select Type (Click the Link)" with a dropdown arrow. Under this section, there are four radio button options:

- 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

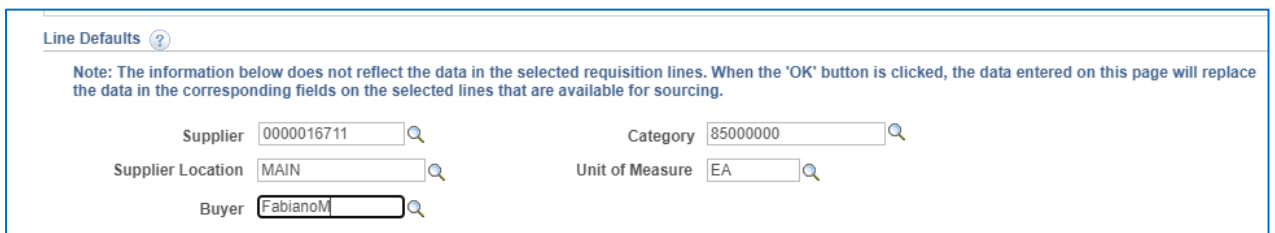
At the bottom of the dialog box, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular border.

9. Enter **Supplier ID**.

10. Enter **Buyer ID**.

11. Enter **Category**.

12. Enter **Unit of Measure**.



The image shows a form titled "Line Defaults" with a help icon. Below the title is a note: "Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing." Below the note are four input fields, each with a magnifying glass icon:

- Supplier: 0000016711
- Supplier Location: MAIN
- Buyer: FabianoM
- Category: 85000000
- Unit of Measure: EA

- 13. Enter **Chartfields** – if defaulted, skip this step.
- 14. Click **OK**.

Dist	Percent	Location	GL Unit	Fund	Dept	SID	Program	Account	Bud Ref	ChartField 1	ChartField 2	PC Bus Unit	Project
1		ACORE	STATE	11000	MHA53186	10020	00000	53717				NONPC	MHA_NONPROJECT

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

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

Create Requisition ?

Welcome MHA-Jackson-Lee Tia

Define Requisition Home 0 Lines

Add Items & Services

- ePro Services
- Request Services
 - Fixed Cost Service**
 - Time and Materials
 - Variable Cost Service

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

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Create Requisition

Welcome MHA-Jackson-Lee Tia Home 0 Lines Checkout

Request Options

All Request Options

Catalog

Special Requests

ePro Services
Fixed Cost Service
Time and Materials
Variable Cost Service

Templates

Favorites

*Service Description Nursing Services Amendment

*Value of Service 70000 *Currency USD

*Category 85000000

Supplier ID 0000016711 Suggest New Supplier

Supplier Name SOUTHEASTERN REGION

*Start Date 12/26/2023 *End Date 12/31/2024

Quote Number Quote Date

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

21. **Shopping Cart** displays.

22. **Click Checkout.**

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



The screenshot shows a 'Shopping Cart' window with a table of items. The table has three columns: 'Description', 'Qty', and 'UOM'. There is one row with the description 'Nursing Services Amendmen...', a quantity of '1', and a unit of measure 'EA'. Below the table, there is a summary section with 'Total Lines' set to '1' and 'Total Amount (USD)' set to '70,000.00'. At the bottom of the window, there are two buttons: 'Close' and 'Checkout'. The 'Checkout' button is highlighted with a red rectangular border.

Description	Qty	UOM
Nursing Services Amendmen...	1	EA

Total Lines: 1
Total Amount (USD): 70,000.00

Buttons: Close, Checkout

23. Click **Save & submit**.

Checkout - Review and Submit

Review the item information and submit the req for approval. Define Requisition

Requisition Summary

Business Unit	MHAM1	Mental Health & Addiction Serv	Requisition Name	PSA Amendment
Requester	Jackson-Lee Tia	MHA-Jackson-Lee Tia	Priority	Medium
*Currency	USD		Requisition Type	PSA - Personal Service

[PSA Details](#)

Cart Summary: Total Amount 70,000.00 USD

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines [?](#)

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Con
1	Nursing Services Amendment		SOUTHEASTERN REGIONAL ACTION COUNCIL	1	Each	70000.00	70000.00		

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 70,000.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location	0640000311
Address	410 Capitol Avenue 4th Floor Office of the Commissioner MS 14 BUS Hartford, CT 06134
Attention To	MHA-Jackson-Lee Tia
Comments	

Requisition Comments and Attachments

Enter requisition comments

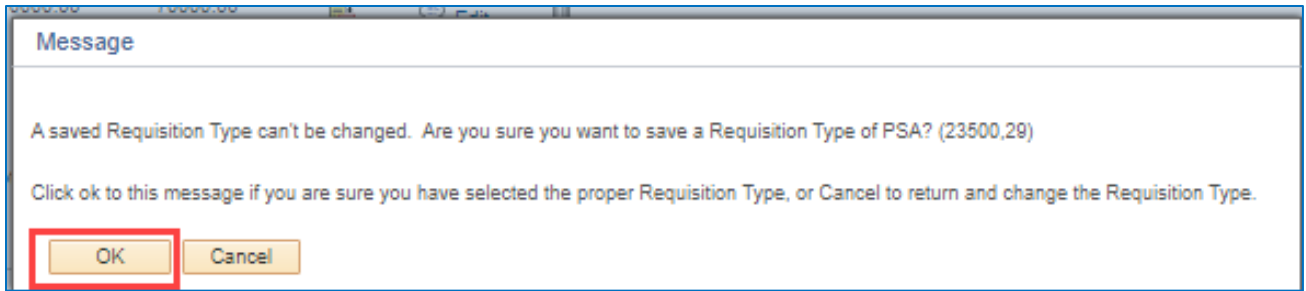
Send to Supplier Show at Receipt Shown at Voucher [Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

[Save & submit](#) [Save for Later](#) [Add More Items](#)

24. A warning message displays about the Requisition Type. If correct, Click OK



25. Amendment submitted in Pending Status.

Confirmation

Your requisition has been submitted.

Requested For	MHA-Jackson-Lee Tia	Number of Lines	1
Requisition Name	PSA Amendment	Total Amount	70,000.00 USD
Requisition ID	0000038260	PSA Details	
Business Unit	MHAM1	Status	Pending
Priority	Medium		
Budget Status	Not Checked		

[View printable version](#) [Edit This Requisition](#)

Agency PSA_POS Approval

PSA Amendment: Pending [Start New Path](#)

Agency PSA_POS Approval

Pending: Multiple Approvers Approves PSA_POS Requests → Not Routed: Multiple Approvers PSA_POS to OPM if >= \$50K

PSA_POS OPM APPROVAL

PSA Amendment: Awaiting Further Approvals [Start New Path](#)

PSA_POS OPM APPROVAL

Not Routed: OPM-Dowd Judith Approves PSA_POS → Not Routed: OPM-Dowd Judith Approves PSA_POS → Not Routed: Multiple Approvers Final PSA_POS Approver

26. Amendment is **Approved**.

Requisition Approval

Confirmation

✔ PSA Amendment has been approved.

Review/Edit Approvers

Agency PSA_POS Approval

▼ PSA Amendment:Approved

Agency PSA_POS Approval

Approved ✔ MHA-Jackson-Lee Tia Approves PSA_POS Requests 12/19/23 - 4:42 PM	→	Auto Approved ✔ MHA-Jackson-Lee Tia PSA_POS to OPM if >= \$50K 12/19/23 - 4:42 PM
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PSA_POS OPM APPROVAL

▼ PSA Amendment:Approved

PSA_POS OPM APPROVAL

Approved ✔ OPM-Dowd Judith Approves PSA_POS 12/19/23 - 4:43 PM	→	Auto Approved ✔ OPM-Dowd Judith Approves PSA_POS 12/19/23 - 4:43 PM	→	Approved ✔ OPM-Meakam, Kevin M Final PSA_POS Approver 12/19/23 - 4:43 PM
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- 27. To Close Requisition, navigate to eProcurement> Manage Requisitions.
- 28. Click Go.

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: MHAM1 Requisition Name: Request State: All but Complete Budget Status: Requisition Type: PO ID:

Date From: 12/12/2023 Date To: 12/19/2023 Requester: Jackson-LeeTia Entered By:

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	Action	Go
▶ 0000038260	PSA Amendment	MHAM1	12/19/2023	Approved	Not Chk'd	70,000.00 USD	[Select Action]	Go
▶ 0000038259	0000038259	MHAM1	12/19/2023	Denied	Not Chk'd	100,000.00 USD	[Select Action]	Go
▶ 0000038258	PSA for Nursing Services	MHAM1	12/19/2023	Pending	Not Chk'd	125,000.00 USD	[Select Action]	Go
▶ 0000038257	TEST POS PSA	MHAM1	12/18/2023	Pending	Not Chk'd	75,000.00 USD	[Select Action]	Go
▶ 0000038256	0000038256	MHAM1	12/15/2023	Pending	Not Chk'd	54,000.00 USD	[Select Action]	Go
▶ 0000038255	TEST	MHAM1	12/13/2023	Pending	Not Chk'd	54,000.00 USD	[Select Action]	Go

- 29. Click Yes.

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: MHAM1 Requisition Name: Request State: All but Complete Budget Status: Requisition Type: PO ID:

Date From: 12/12/2023 Date To: 12/19/2023 Requester: Jackson-LeeTia Entered By:

Search Clear Show Advanced Search

Requisitions

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To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	Action	Go
▶ 0000038260	PSA Amendment	MHAM1	12/19/2023	Approved	Not Chk'd	70,000.00 USD	Close	Go
▶ 0000038259	0000038259	MHAM1	12/19/2023	Denied	Not Chk'd	100,000.00 USD	[Select Action]	Go
▶ 0000038258	PSA for Nursing Services	MHAM1	12/19/2023	Pending	Not Chk'd	125,000.00 USD	[Select Action]	Go
▶ 0000038257	TEST POS PSA	MHAM1	12/18/2023	Pending	Not Chk'd	75,000.00 USD	[Select Action]	Go
▶ 0000038256	0000038256	MHAM1	12/15/2023	Pending	Not Chk'd	54,000.00 USD	[Select Action]	Go
▶ 0000038255	TEST	MHAM1	12/13/2023	Pending	Not Chk'd	54,000.00 USD	[Select Action]	Go
▶ 0000038254	Test non comp PSA	MHAM1	12/13/2023	Pending	Not Chk'd	51,000.00 USD	[Select Action]	Go
▶ 0000038253	PSA waiver page & AWE	MHAM1	12/13/2023	Pending	Not Chk'd	51,000.00 USD	[Select Action]	Go

Message

Closing Requisition - 0000038260. (23500.80)

This process will close the approved amendment. Are you sure you would like to do this?

Yes No

- 30. Request State updated to Complete.
- 31. Total updated to \$0.00 USD.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	MHAM1	Requisition Name		Budget Status	
Requisition ID		Request State		Requisition Type	
Date From	12/12/2023	Date To	12/19/2023	PO ID	
Requester	Jackson-LeeTia	Entered By			

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000038260	PSA Amendment	MHAM1	12/19/2023	Complete	Valid	0.00 USD	[Select Action] Go