



Types of Requisitions: PSA_POS

Navigation:

eProcurement > Requisition

Procedure:

1. **Business Unit** is populated.

Define Requisition

Business Unit **MHAM1** Mental Health & Addiction Serv Requisition Name
Requester Jackson-Lee Tia MHA-Jackson-Lee Tia Priority Medium
*Currency USD Requisition Type **POS - Purchase of Service**
POS Details

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 the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier Category 85000000
Supplier Location Unit of Measure
Buyer

Shipping Defaults

Ship To 084000311 Add One Time Address
Due Date Attention

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | 1 of 1 | Last

Chartfields1	Details	Asset Information	Asset						
Dist	Percent	Location	GL Unit	Fund	Dept	SID	Program	Account	Bud R
1		ACORE	STATE		MHA53188				

OK Cancel

2. Enter the **Requisition Name**
3. **PSA – Personal Service** for the Requisition Type

Define Requisition

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

Requisition Name: **TEST POS PSA**
Priority: Medium
Requisition Type: POS - Purchase of Service
POS Details

Default Options (2)

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 the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier: [] Category: 85000000
Supplier Location: [] Unit of Measure: []
Buyer: []

Shipping Defaults

Ship To: 0640000311 Add One Time Address
Due Date: [] Attention: []

Distribution Defaults

SpeedChart: []

Accounting Defaults Personalize | Find | [] [] First 1 of 1 Last

Chartfields1 | Details | Asset Information: []

Dist	Percent	Location	GL Unit	Fund	Dept	SID	Program	Account	Bud R
1	[]	ACORE []	STATE []	[]	MHA53186 []	[]	[]	[]	[]

OK Cancel

4. Click on the POS Details Link

Define Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv Requisition Name: TEST POS PSA
Requester: Jackson-Lee Tia MHA-Jackson-Lee Tia Priority: Medium
*Currency: USD Requisition Type: POS - Purchase of Service
POS Details

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 the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier: [] Category: 85000000
Supplier Location: [] Unit of Measure: []
Buyer: []

Shipping Defaults

Ship To: 0640000311 Add One Time Address
Due Date: [] Attention: []

Distribution Defaults

SpeedChart: []

Accounting Defaults

Dist	Percent	Location	GL Unit	Fund	Dept	SID	Program	Account	Bud R
1		ACORE	STATE		MHA53188				

OK Cancel

5. Click on [Hyperlink](#) for **Purchase of Service - POS** Competitive Purchase of Service Greater than \$50,000.

POS Details

Select Type (Click the Link)

Purchase of Service POS
Competitive Purchase of Service greater than \$50,000

Waiver from Competitive Solicitation POS
NON-COMPETITIVE Purchase of Service contract Greater than \$50,000

Non-Competitive POS
Greater than \$50,000 fewer than 3 acceptable proposals received in response to an RFP

Amendment POS
Amendment to an existing Purchase of service contract

OK Cancel

6. Answer all questions.

Purchase of Service POS

Competitive Purchase of Service greater than \$50,000

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

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 Is this to establish a new contract for ongoing services?
If yes, provide the following information about the previous contract:

Contract ID:

Contract Type: POC Competitive

Supplier ID:

Begin Date: End Date:

Maximum Amount:

Total # of years contracting with this provider:

Date of last RFP:

OK Cancel

7. Click **OK**

POS Details

Select Type (Click the Link)

- Purchase of Service POS**
Competitive Purchase of Service greater than \$50,000
- Waiver from Competitive Solicitation POS
NON-COMPETITIVE Purchase of Service contract Greater than \$50,000
- Non-Competitive POS
Greater than \$50,000 fewer than 3 acceptable proposals received in response to an RFP
- Amendment POS
Amendment to an existing Purchase of service contract

OK Cancel

8. Enter the Supplier ID
9. Buyer
10. Category
11. Unit of Measure

Define Requisition

Business Unit	MHAM1	Mental Health & Addiction Serv	Requisition Name	TEST POS PSA
Requester	Jackson-LeeTia	MHA-Jackson-Lee Tia	Priority	Medium
*Currency	USD		Requisition Type	POS - Purchase of Service

POS Details

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 the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier	0000011728	Category	85000000
Supplier Location	MAIN	Unit of Measure	HR
Buyer	FabianoM		

12. Enter Chartfields – If the chartfields are defaulted skip this step.

Define Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv Requisition Name: TEST FOS PSA
 Requester: Jackson-Lee Tia MHA-Jackson-Lee Tia Priority: Medium
 *Currency: USD Requisition Type: POS - Purchase of Service
 FOS Details

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 the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier: 0000011728 Category: 85000000
 Supplier Location: MAJN Unit of Measure: HR
 Buyer: Fabiano M

Shipping Defaults

Ship To: 0840000311 Add One Time Address
 Due Date: Attention:

Distribution Defaults

SpeedChart:

Accounting Defaults

Item	Percent	Location	GL Unit	Fund	Dept	SID	Program	Account	Bud R
1		ACORE	STATE	11000	MHA63185	10020	00000	51290	

13. Click **OK**

14. Click **Fixed Cost Service** link

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

Favorites Main Menu > eProcurement > Requisition

ORACLE All Search Advanced Search

Create Requisition

Welcome MHA-Thrall Dee Define Requisition Home 0 Lines

Add Items & Services

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

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**

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 TEST SERVICE

*Value of Service 75000.00 *Currency USD

*Category 85000000

Supplier ID 0000011728 Suggest New Supplier

Supplier Name COMMUNITY HEALTH RE

*Start Date 01/02/2024 *End Date 12/31/2024

Quote Number Quote Date

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

19. Click **Add to Cart**

The screenshot shows the 'Create Requisition' interface. On the left is a sidebar with 'Request Options' and 'All Request Options' (highlighted). The main area contains form fields for service details: *Service Description (TEST SERVICE), *Value of Service (75000.00), *Currency (USD), *Category (85000000), Supplier ID (0000011728), Supplier Name (COMMUNITY HEALTH RE), *Start Date (01/02/2024), *End Date (12/31/2024), and Quote Number. Below these are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Add to Cart' button at the bottom is highlighted with a red box.

20. The **Shopping Cart** displays

21. Click **Checkout**

The screenshot shows a 'Shopping Cart' window with a table containing one item:

Description	Qty	UOM
TEST SERVICE	1	EA

Summary statistics at the bottom:

Total Lines	1
Total Amount (USD)	75,000.00

Buttons for 'Close' and 'Checkout' are at the bottom, with 'Checkout' highlighted by a red box.

Note: Do this process for additional services you wish to place on your requisition.

22. Click on the **Comments** bubble

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	TEST POS PSA
Requester	Jackson-LeeTia	MHA-Jackson-Lee Tia	Priority	Medium
*Currency	USD		Requisition Type	POS - Purchase of Service
				POS Details

Cart Summary: Total Amount 75,000.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	TEST SERVICE		COMMUNITY HEALTH RESOURCES INC	1	Each	75000.00	75000.00		 Edit	

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

Total Amount 75,000.00 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	

23. Add a **Comment**

24. Click on **Add Attachments**

Line Comment

Business Unit MHAM1 Requisition Date 12/18/2023
Status Open

Line 1

Comments Find First 1 of 1 Last

Use Standard Comments Entered On:

1 **Start Date:01-02-2024**End Date:12-31-2024

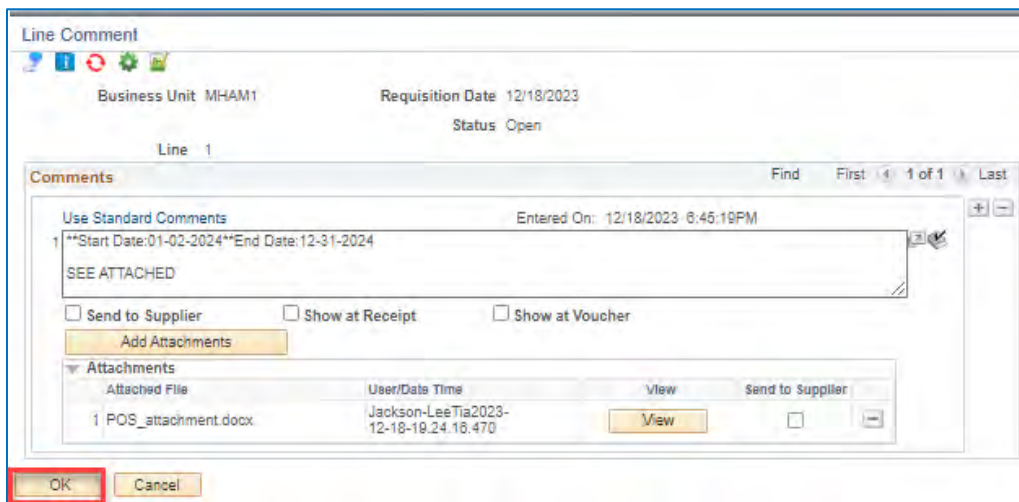
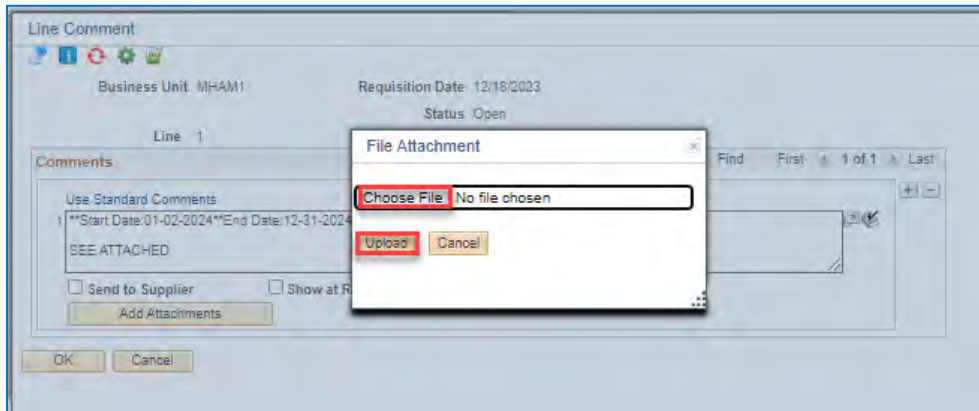
SEE ATTACHED

Send to Supplier Show at Receipt Show at Voucher

Add Attachments

OK Cancel

- 25. Click on **Choose File** and find a file to attach
- 26. Click **Upload**



- 27. Click **OK**

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

Requisition Comments and Attachments

Enter requisition comments

Budget Reference 2024

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

This service is required for|ABC.....

29. 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: TEST POS PSA

Requester: Jackson-LeeTia MHA-Jackson-Lee Tia Priority: Medium

*Currency: USD Requisition Type: POS - Purchase of Service

POS Details

Cart Summary: Total Amount 75,000.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	TEST SERVICE		COMMUNITY HEALTH RESOURCES INC	1	Each	75000.00	75000.00			

Select All / Deselect All Select lines to:

Total Amount 75,000.00 USD

Shipping Summary

Edit for All Lines

Ship To Location: 0840000311

Address: 410 Capitol Avenue 4th Floor
Office of the Commissioner
MS 14 BUS
Hartford, CT 06134

Attention To Comments: MHA-Jackson-Lee Tia

Requisition Comments and Attachments

Enter requisition comments

Budget Reference 2024

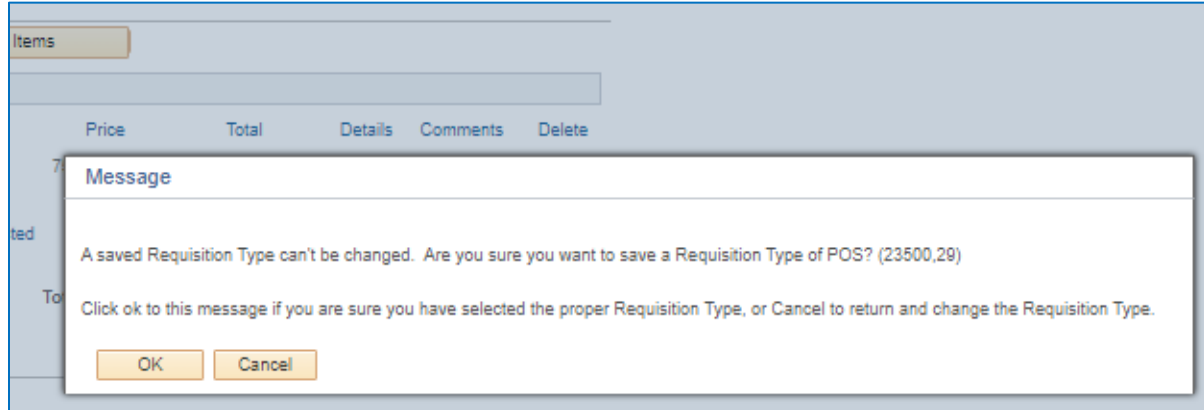
Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

This service is required for|ABC.....



30. Click **OK**

- 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.

(Once 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).

Confirmation

Your requisition has been submitted.

Requested For: MHA-Jackson-Lee Tia	Number of Lines: 1
Requisition Name: TEST POS PSA	Total Amount: 75,000.00 USD
Requisition ID: 000038257	Approval Justification: This service is required for ABC.....
Business Unit: MHAM1	Bid ID: 23MHA38257 POS Details
Status: Pending	
Priority: Medium	
Budget Status: Not Checked	

View printable version Edit This Requisition

Agency PSA_POS Approval

TEST POS PSA: Pending

Agency PSA_POS Approval

```
graph LR; A[Pending: Multiple Approvers Approves PSA_POS Requests] --> B[Not Routed: Multiple Approvers PSA_POS to OPM if >= $50K]
```

PSA_POS OPM APPROVAL

TEST POS PSA: Awaiting Further Approvals

PSA_POS OPM APPROVAL

```
graph LR; A[Not Routed: OPM-Dowd Judith Approves PSA_POS] --> B[Not Routed: OPM-Dowd Judith Approves PSA_POS] --> C[Not Routed: Multiple Approvers Final PSA_POS Approver]
```

Create New Requisition Manage Requisitions