PSA_POS Agency Approvals
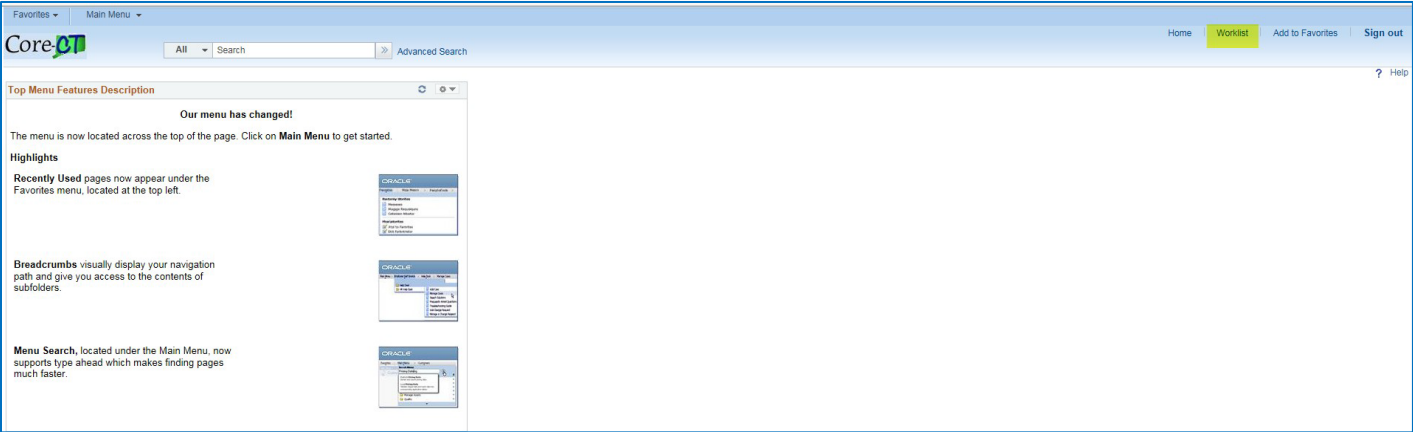
Process for Agency PSA_POS Agency Approvers

- Log into Core-CT and click on the Worklist button:

- Worklist Displays

- Click on the Requisition Link to open the request
- View Line Details for Chartfield information by chosing a line(s) & clicking on the View Line Details Link
- View PSA_POS Details by Clicking on PSA Details Link

- View Attachments by clicking on the comments bubble
- Approve, Deny or Hold by clicking the the appropriate button

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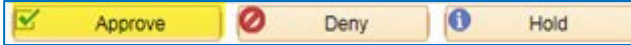
Requisition Approval

Business Unit	MHAM1
Requisition ID	0000038256
Requisition Name	0000038256
Requester	MHA-Jackson-Lee Tia
Entered on	12/15/2023
Status	Pending
Priority	Medium
Budget Status	Not Checked

Requisition Type POS - Purchase of Service   Total Amount   54,000.00 USD
Bid ID 23MHA38256
POS Details

Requester's Justification
Budget Ref 2024

View printable version

Edit Requisition

▼ Line Information ⓘ

Line Information							
					Personalize	Find	🗗	First ◄ 1 of 1 ► Last
Line▲		Item Description▲	Supplier Name	Quantity	UOM	Price	Requester's Comments
☐	1	nursing services	CONNECTICUT NURSES ASSOCIATION	1.0000	EA	54000.00000	USD	💬

☐ Select All / Deselect All

View Line Details

▼ Review/Edit Approvers

Requisition Line(s): ⃒◄ ◄◄ 1 🔍 To 🔍 of 1 ►► ►⃒ Retrieve

Agency PSA_POS Approval

▼ Requisition 0000038256:Pending   ➕ Start New Path

Agency PSA_POS Approval

Pending	Not Routed
Multiple Approvers ⏱ Approves PSA_POS Requests	Multiple Approvers 🖨 PSA_POS to OPM if >/= $50K

PSA_POS OPM APPROVAL

▼ Requisition 0000038256:Awaiting Further Approvals   ➕ Start New Path

PSA_POS OPM APPROVAL

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

Enter Approver Comments

Approve   Deny   Hold

2

PSA_POS Agency Approvals

- After reviewing all the information that displays on the requisition approval page, select the line by checking the box at the beginning of the line and click View Line Details

	Line		Item Description▲	Supplier Name▲	Quantity	UOM	Price		Requester's Comments
☑	1		nursing services	CONNECTICUT NURSES ASSOCIATION	1.0000	EA	54000.00000	USD	

Line Information — Personalize | Find | First ◀ 1 of 1 ▶ Last

☐ Select All / Deselect All

View Line Details

- Line Details displays Chartfields, Start and End dates, Budget Reference, dollar amount, etc....

Business Unit: MHAM1 **Requester:** Jackson-LeeTia **Status:** Pending Approval
Requisition: 0000038256 **Requested By:** MHA-Jackson-Lee Tia **Currency:** USD
Requisition Name: 0000038256 **Entered Date:** 12/15/23 **Requisition Total:** 54,000.00
Header Comments:
Budget Ref 2024

Line: 1 **Item Description:** nursing services **Quantity:** 1.0000 **UOM:** EA **Price:** 54000.0000 **Line Total:** 54,000.00 **Cntrct_ID:**

Line Status: Pending **PO_Auth:** CONT
CM Num:

Line Comments:
Start Date:12-14-2023 End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023

Ship Line: 1 **Ship To:** 0640000311 **Address:** **Shipping Quantity:** 1.0000
Attention: MHA-Jackson-Lee Tia **Due Date:** 12/15/23 410 Capitol Avenue 4th Floor **Shipping Total:** 54,000.00
Ship Via: COMMON **Freight Terms:** FOB DEST Office of the Commissioner
MS 14 BUS
Hartford CT 06134
United States

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ACORE	1.0000	100.00	54,000.00	STATE	53380

Dept	Fund	Program	Class
MHA53186	11000	00000	10020

Open QTY	PC BU	Project	Open Amt
1.0000	NONPC	MHA_NONPROJECT	0.000

GL Base Amount	Currency	Sequence	Capitalize
54,000.00	USD	0	N

- Click on the PSA/POS Details Link to view the type of PSA/POS and the required forms associated with them.

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)?

Following Waiver Code discontinued from FY 2022

○ N/A ○ Yes ○ No   Has a Cost-Effectiveness Evaluation (CEE) per §4e-16(p) or a Contract Standards Board Approval (CBA) per §4e-16(a) been completed?

● 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
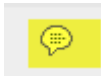
Supplier ID:

Begin Date: End Date:

Maximum Amount:

Total # of years contracting with this provider:

Date of last RFP:

7. Click on the comments bubble to view the attachments

Requisition Line Comments and Attachments   Help

Business Unit MHAM1   Requisition ID 0000038256

Line 1   Item Description nursing services

▼ Comment 1

Start Date:12-14-2023 End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023

Sequence	Attached File
1	POS.docx

Return

Click on Edit Requisition to edit the request.

Click OK

The Approver can edit PSA_POS Details, Price, Qty, Line Details, Chartfields comments, etc.

To expand the lines Click on the arrows at the beginning of each line.

PSA_POS Agency Approvals

- 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 0000038256
Requester	Jackson-LeeTia	MHA-Jackson-Lee Tia	Requisition ID 0000038256
*Currency	USD		Priority Medium
			Requisition Type POS - Purchase of Service

POS Details

Cart Summary: Total Amount 54,000.00 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	nursing services		CONNECTICUT NURSES ASSOCIATION	1	Each	54000.00	54000.00		Edit	

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

Total Amount   54,000.00 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

Budget Ref 2024

Save & submit	Save for Later	Add More Items

- Enter Approver Comments (if any) and either Approve, Deny, Hold Requisition or Pushback (only Agency Submitter can Pushback)

Enter Approver Comments

Approve	Deny	Hold	Pushback

Return to Worklist

PSA_POS Agency Approvals

ACTIONS & STATUSES

- **Approve** the requistion and it routes to the next approver in Workflow
  - Req. Status Pending

- **Deny** the requisition requires a comment and gets routed back to the PSA_POS Requester
  - Req. Status Denied

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

- **Pushback** will send the requisition to the previous approver
  - Req. Status Pending

Once Approved, the requisition will be routed to the next Agency Approver and the Approvers step status will change to APPROVED. (If you are the Agency Submitter the next Approver will be OPM).

*Editing the requisition will reinitiate workflow so that all stakeholders can view and approve the changes.

PSA_POS Agency Approvals

The Agency Service Approver must approve the requisition again.

PSA_POS Agency Approvals

Requisition Approval

Confirmation

✔ 0000038256 has been routed for further approval.

Review/Edit Approvers

Agency PSA_POS Approval

▼ Requisition 0000038256:Approved

Agency PSA_POS Approval

Approved	Auto Approved
✔ MHA-Jackson-Lee Tia Approves PSA_POS Requests 12/15/23 - 9:01 AM	✔ MHA-Jackson-Lee Tia PSA_POS to OPM if >/= $50K 12/15/23 - 9:01 AM

PSA_POS OPM APPROVAL

▼ Requisition 0000038256:Pending

PSA_POS OPM APPROVAL

Pending	Not Routed	Not Routed
🕐 OPM-Dowd Judith Approves PSA_POS	🖨 OPM-Dowd Judith Approves PSA_POS	🖨 Multiple Approvers Final PSA_POS Approver

Return to Worklist

To view any PSA_POS requisition, Agency Approvers can navigate to: eProcurement > Manage Requisition and search for a PSA_POS requisition using criteria. i.e. Req. number, Req. Type, Date Range, etc.

EPM Reports can also be developed by request as needed for business requirements.

There are two (2) new roles for the Agency PSA_POS Approval process:

- CT AGY SERVICE APPROVER – Responsible for reviewing the PSA_POS information, editing requisition, if necessary, and approving or denying the request at the agency level.

- CT_F_A_PSA_POS_SUBMITTER – Responsible for submitting PSA_POS requisitions to OPM. Role is restricted to an agency's Deputy Commissioner, CFO, FAM or other user with a similar level of authority.

PSA_POS Agency Approvals

The BIG PICTURE is a very integrated streamlined & cost saving approach. This initiative eliminates costs for licensing, maintenance and consulting services for a standalone outdated systems.

A. Once the ==Pre-Authorization== is completed the Req BID Contract Creator will be able to convert the requisition into a Procurement Contract in Core-CT. All the information on the requisition will populate onto the Contract. It will remain in an OPEN status until the Supplier Contract is fully executed.

B. The Supplier Contract can be created by clicking on the Create Document Link on the Procurement Contract. It will be compiled from all the legal documents in the contract library. The User will be able to collaborate with the Supplier and the AG's office using this new functionality to negotiate the Supplier's contract. It will be signed using DocuSign software within the system. Once fully executed the Procurement Contract will be approved.

C. The end user will be able to create a purchase order by copying the Procurement Contract into the PO. The purchase order will go through the existing PO Approval workflow and be dispatched electronically to the vendor.

D. Once services are received in the system a voucher is created and the supplier is paid.