

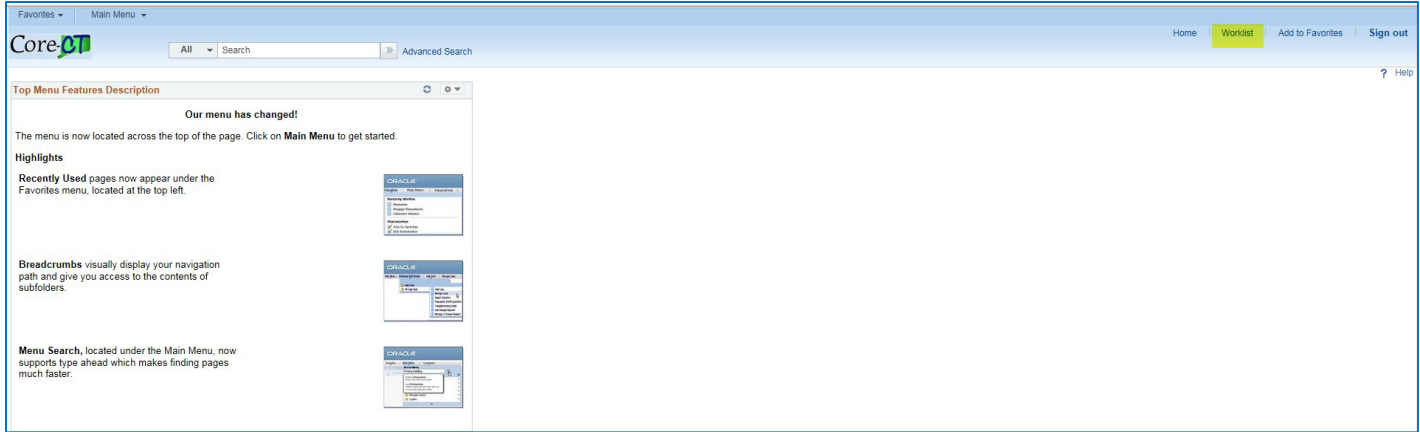


OPM PSA_POS Budget Approvals

eProcurement
January 1, 2024

Process for OPM Budget Approvers

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



- Worklist Displays

Worklist

Worklist for Jackson-LeeTia: MHA-Jackson-Lee Tia

Detail View Worklist Filters: Approval Routing


From	Date From	Work Item	Worked By Activity	Priority	Link		
MHA-Jackson-Lee Tia	12/18/2023	Approval Routing	Approval Workflow	2-Medium	Requisition, 2828329, STATE, 2023-07-15, N, 0, BUSINESS UNIT:MHAM1, REQ ID:0000038296, Agency Service Approver: CONNECTICUT NURSES ASSOCIATION - nursing services - 54000.01	Mark Worked	Reassign
MHA-Jackson-Lee Tia		Approval Routing	Approval Workflow	2-Medium	Requisition, 2828326, STATE, 2023-07-15, N, 0, BUSINESS UNIT:MHAM1, REQ ID:0000038295, Agency Service Approver: GRANGER INDUSTRIAL SUPPLY - test, 54000.		Reassign

You can see who it is from

You can also see the requisition ID, Business Unit, Supplier, and part of the description from the worklist

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- Click on the Requisition Link to open the request
- View Comment History by clicking on the [View History Link](#)
- View Line Details for Chartfield information by clicking on the [View Line Details Link](#)
- View PSA_POS Details by Clicking on [POS Details Link](#)
- View Attachments by clicking on the comments bubble 


Requisition Approval

Business Unit [MHAM1](#)
 Requisition ID [0000038256](#)
 Requisition Name 0000038256
 Requester MHA-Jackson-Lee Tia
 Entered on 12/15/2023
 Status Pending Requisition Type POS - Purchase of Service Total Amount 54,000.00 USD
 Priority Medium Bid ID 23MHA38256
 Budget Status Not Checked [POS Details](#)

Requester's Justification
[Budget Ref 2024](#)







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

Line Information Personalize | Find | 

Line	Item Description	Supplier Name	Quantity	UOM	Price	USD	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):    To  of 1   [Retrieve](#)

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Agency PSA_POS Approval

Requisition 0000038256:Approved View/Hide Comments
Start New Path

Agency PSA_POS Approval

Approved

MHA-Jackson-Lee Tia
Approves PSA_POS Requests
12/18/23 - 5:54 PM

Auto Approved

MHA-Jackson-Lee Tia
PSA_POS to OPM if >= \$50K
12/18/23 - 5:54 PM

Comment History

MHA-Jackson-Lee Tia at 12/18/23 - 5:19 PM
[View History](#)

PSA_POS OPM APPROVAL

Requisition 0000038256:Pending View/Hide Comments
Start New Path

PSA_POS OPM APPROVAL

Pending

OPM-Dowd Judith
Approves PSA_POS

Not Routed

OPM-Dowd Judith
Approves PSA_POS

Not Routed

Multiple Approvers
Final PSA_POS Approver

Comment History

MHA-Jackson-Lee Tia at 12/18/23 - 5:19 PM
[View History](#)

Enter Approver Comments

Approve
 Deny
 Hold

[Return to Worklist](#)

- 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 Information Personalize | Find | First 1 of 1 Last

	Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
<input checked="" type="checkbox"/>	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

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



OPM PSA_POS Budget Approvals

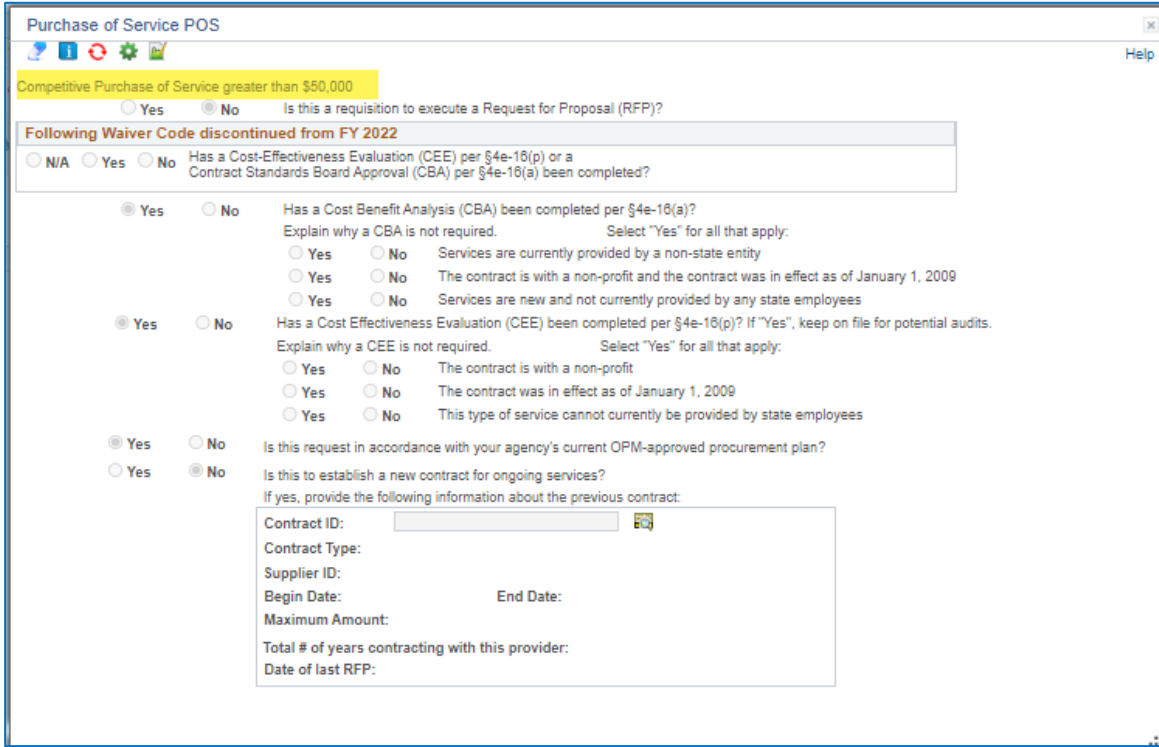
eProcurement
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Business Unit: MHAM1		Requester: Jackson-LeeTia		Status: Pending Approval			
Requisition: 0000038256		Requested By: MHA-Jackson-Lee Tia		Currency: USD			
Requisition Name: 0000038256		Entered Date: 12/15/23		Requisition Total: 54,000.00			
Header Comments: Budget Ref 2024							
Line: 1	Item Description: nursing services	Quantity: 1.0000	UOM: EA	Price: 54000.0000	Line Total: 54,000.00		
				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**Start Date:12-14-2023**End Date:12-15-2023							
Ship Line: 1		Ship To: 0640000311		Address:			
Attention: MHA-Jackson-Lee Tia		Due Date: 12/15/23		Shipping Quantity: 1.0000			
Ship Via: COMMON		Freight Terms: FOB DEST		Shipping Total: 54,000.00			
				410 Capitol Avenue 4th Floor Office of the Commissioner MS 14 BUS Hartford CT 06134 United States			
Diet	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ACORE	1.0000	100.00	54,000.00	STATE	53380
Dept		Fund		Program		Class	
MHA53185		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	

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- Click on the POS Details Link to view the type of 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

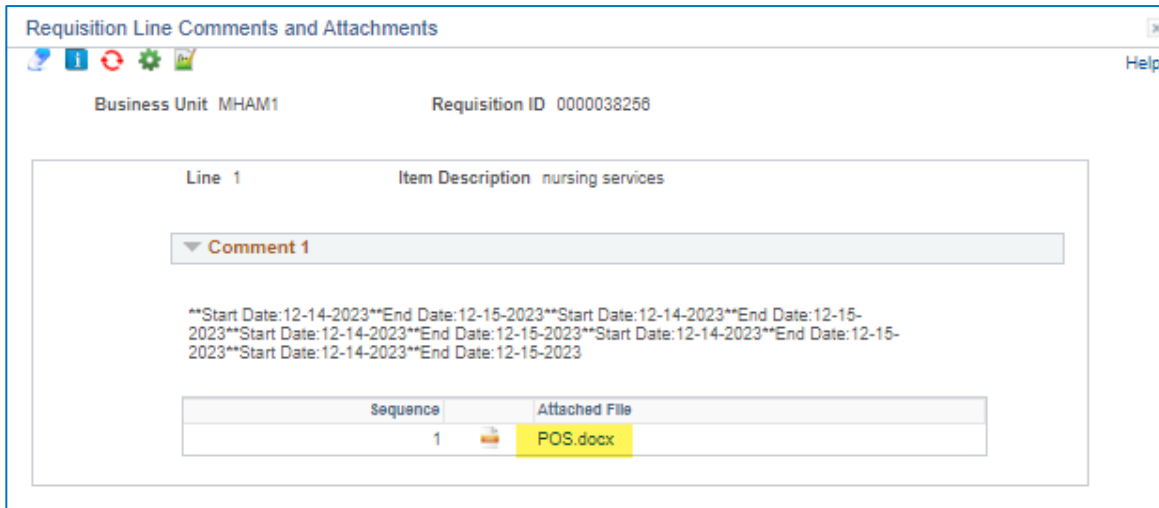
Yes No Has a Cost Effectiveness Evaluation (CEE) been completed per §4e-16(p)? If "Yes", keep on file for potential audits.
 Explain why a CEE is not required. Select "Yes" for all that apply:

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:
 Supplier ID:
 Begin Date: End Date:
 Maximum Amount:
 Total # of years contracting with this provider:
 Date of last RFP:

- Click on the comments bubble to view the attachments


Requisition Line Comments and Attachments

Business Unit MHAM1 Requisition ID 0000038256

Line 1 Item Description nursing services

▼ **Comment 1**

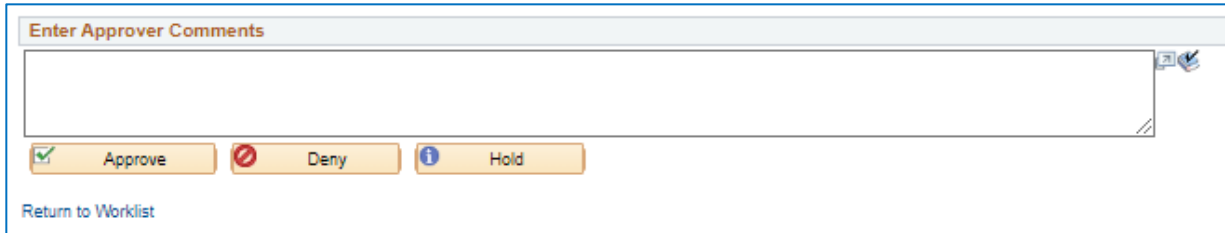
Start Date:12-14-2023End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023**Start Date:12-14-2023**End Date:12-15-2023

Sequence	Attached File
1	 POS.docx

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- Enter Approver Comments (if any) and either Approve, Deny or Hold Requisition



- Approve** the requisition 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 Approver takes it off HOLD and approves it once the required documentation has been added.
 - Req. Status Pending

Once Approved, the requisition will be routed to the next OPM Approver and the Approver's step status will change to APPROVED.

OPM PSA_POS Budget Approvals

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Requisition Approval

Confirmation

✔ 0000038256 has been routed for further approval.

Review/Edit Approvers

Agency PSA_POS Approval

▼ Requisition 0000038256:Approved View/Hide Comments

Agency PSA_POS Approval

Approved ✔ MHA-Jackson-Lee Tia Approves PSA_POS Requests 12/18/23 - 5:54 PM	→	Auto Approved ✔ MHA-Jackson-Lee Tia PSA_POS to OPM if >/= \$50K 12/18/23 - 5:54 PM
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▼ Comment History

MHA-Jackson-Lee Tia at 12/18/23 - 5:19 PM
[View History](#)

PSA_POS OPM APPROVAL

▼ Requisition 0000038256:Pending View/Hide Comments

PSA_POS OPM APPROVAL

Approved ✔ OPM-Dowd Judith Approves PSA_POS 12/18/23 - 6:16 PM	→	Auto Approved ✔ OPM-Dowd Judith Approves PSA_POS 12/18/23 - 6:16 PM	→	Pending 🕒 Multiple Approvers Final PSA_POS Approver
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▼ Comment History

MHA-Jackson-Lee Tia at 12/18/23 - 5:19 PM
[View History](#)

[Return to Worklist](#)

To view any PSA_POS document, OPM 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...

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

There are three (3) new roles for this process:

- OPM Budget Approver 1 – OPM Budget Analyst and backup responsible for approving PSA_POS requisitions
- OPM Budget Approver 2 – OPM Budget Section Director responsible for approving PSA_POS requisitions
- OPM Final Budget Approver - OPM Budget Section Director responsible for approving PSA_POS requisitions

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 PSA_POS Requester 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.
- 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 approved and signed off on, 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.