



PSA_POS Agency Approvals

eProcurement
March 19, 2018

Process for Agency PSA_POS Agency Approvers

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



- Worklist Displays

Worklist

Worklist for ScrivanoB: MHA-Scrivano Brad

Detail View

Worklist Filters: **Approval Routing** Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
MHA-Thrall Dee	03/19/2018	Approval Routing	Approval Workflow	2-Medium	Requisition: 2557941, STATE, 2012-10-16, N.O. BUSINESS UNIT: MHAM1 REQ ID: 0000032056, Agency Service Approver: 034155, ABILUS INC, Mental Health - Nursing Servis, 23000.	Mark Worked	Reassign

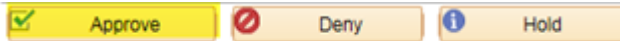
Refresh



PSA_POS Agency Approvals

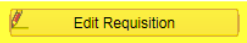
eProcurement
March 19, 2018

- Click on the Requisition Link to open the request
- View Line Details for Chartfield information by choosing 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



Requisition Approval

Business Unit MHAM1
Requisition ID 0000032056
Requisition Name Nursing Services - MHA
Requester MHA-Thrall Dee
Entered on 03/19/2018
Status Pending
Priority Medium
Budget Status Not Checked
Requisition Type PSA - Personal Service
Bid ID 18MHA32056
Total Amount 23,000.00 USD
Requisition Details
Requester's Justification
Bud. Ref 2018



Header Comments

View printable version

Line Information

Line Information							
Personalize Find First 1 of 1 Last							
Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments	
1	Mental Health - Nursing Serv...	ABILIS INC	1.0000	EA	23000.00000 USD		

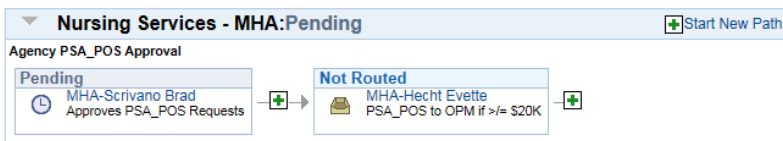
Select All / Deselect All

View Line Details

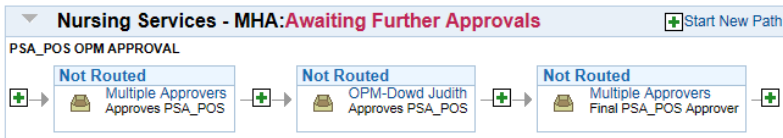
Review/Edit Approvers

Requisition Line(s): 1 To 1 of 1 Retrieve

Agency PSA_POS Approval



PSA_POS OPM APPROVAL



Enter Approver Comments

Approve Deny Hold

Return to Worklist



PSA_POS Agency Approvals

eProcurement
March 19, 2018

- 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 ?

Line Information Personalize | Find | 1 of 1 Last

	Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
<input checked="" type="checkbox"/>	1	Mental Health - Nursing Serv...	ABILIS INC	1.0000	EA	23000.00000 USD	

☒ Select All / Deselect All

Click on View Line Details

▼ Review/Edit Approvers

Requisition Line(s): 1 To 1 of 1

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

Business Unit: MHAM1 **Requester:** ThrallD **Status:** Pending Approval
Requisition: 0000032056 **Requested By:** MHA-Thrall Dee **Currency:** USD
Requisition Name: Nursing Services - MHA **Entered Date:** 3/19/18 **Requisition Total:** 23,000.00
Header Comments:
See Attachment.
Bud. Ref 2018

Line: 1 **Item Description:** Mental Health - Nursing Services **Quantity:** 1.0000 **UOM:** EA **Price:** 23000.0000 **Line Total:** 23,000.00
Line Status: Pending

Line Comments:
Quote Date:03-26-2020Start Date:03-16-2018**End Date:03-28-2020**Quote Date:03-26-2020**Start Date:03-16-2018**End Date:03-28-2020

Ship Line: 1 **Ship To:** 1510000059 **Address:** 55 West Main Street Suite 410 **Shipping Quantity:** 1.0000
Attention: MHA-Thrall Dee **Due Date:** 3/28/20 **Western Mental Health Network** **Shipping Total:** 23,000.00
Ship Via: COMMON **Freight Terms:** FOB DEST **Waterbury LMHA**
Waterbury CT 06702
United States

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ACORE	1.0000	100.00	23,000.00	STATE	54060

Dept	Fund	Program	SID
MHA53850	11000	00000	10020

Open QTY	PC BU	Project	Open Amt
0.0000	NONPC	MHA_NONPRO JECT	23000.000

GL Base Amount	Currency	Sequence	Capitalize
23,000.00	USD	0	N

PSA_POS Agency Approvals

eProcurement
March 19, 2018

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

Personal Service Agreement PSA

COMPETITIVE Personal Services Agreement Greater than \$50,000 & 1 year

☐ Yes ☒ No Does the scope of work for this PSA include auditing services?
☒ 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 the agency contracted out for these services during the preceding two years?
 If yes, provide the following information about the previous contract.
 Contract ID:
 Contract Type: PSC Competitive
 Supplier ID:
 Begin Date: End Date:
 Maximum Amount:
☐ Yes ☒ No Does another State agency have the resources to provide these services?
☐ Yes ☒ No Can these services be purchased on a cooperative basis with another State agency?
☐ Yes ☒ No Will the services (irrespective of contractor) be ongoing?

7. Click on the comments bubble to view the attachments



Line Comment

Business Unit MHAM1 Requisition Date 02/09/2018
 Requisition ID 0000031743 Status Pending
 Line 2

Comments Find First 1 of 1 Last

Use Standard Comments Entered On: 02/15/2018 8:28:20AM

1 **Start Date:02-15-2018**End Date:02-20-2020

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Attached File	User/Date Time	View	Send to Supplier
1 Creating_PSA_Requisition. rev1.docx	HechtE2018-02-15- 09.10.33.330	<input type="button" value="View"/>	<input type="checkbox"/>

OK Cancel



PSA_POS Agency Approvals

eProcurement
March 19, 2018

Click on Edit Requisition to edit the request.

Requisition Approval

Business Unit MHAM1
Requisition ID 0000032056
Requisition Name Nursing Services - MHA
Requester MHA-Thrall Dee
Entered on 03/19/2018
Status Pending
Priority Medium
Budget Status Not Checked
Requisition Type PSA - Personal Service
Bid ID 18MHA32056
Total Amount 23,000.00 USD
PSA Details
Requester's Justification
Bud. Ref 2018

Edit Requisition

[Header Comments](#)

[View printable version](#)

▼ Line Information ?

Line Information Personalize | Find | First 1 of 1 Last

	Line	Item Description	Supplier Name	Quantity	UOM	Price		Requester's Comments
<input type="checkbox"/>	1	Mental Health - Nursing Serv...	ABILIS INC	1.0000	EA	23000.00000	USD	

☐ Select All / Deselect All
 View Line Details

▼ Review/Edit Approvers

Requisition Line(s): 1 To of 1

Click OK

Message

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)

OK Cancel

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

eProcurement
March 19, 2018

Edit Requisition - 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	Nursing Services - MHA
Requester	ThrallID	MHA-Thrall Dee	Requisition ID	0000032056
*Currency	USD		Priority	Medium
Card Number			Requisition Type	PSA - Personal Service
Expiration Date				
<input type="checkbox"/> Use Procurement Card				

PSA Details

Cart Summary: Total Amount 25,000.00 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	Mental Health - Nursing Service		ABILIS INC	1	Each	25,000.00000	25000.00		Edit	
<input type="checkbox"/> Select All / Deselect All										
Select lines to:			<input type="button" value="Add to Favorites"/>	<input type="button" value="Add to Template(s)"/>	<input type="button" value="Delete Selected"/>	<input type="button" value="Mass Change"/>				
Total Amount							25,000.00 USD			

Shipping Summary

Edit for All Lines

Ship To Location 1510000059
Address 55 West Main Street Suite 410
Western Mental Health Network
Waterbury LMHA
Waterbury, CT 06702
Attention To MHA-Thrall Dee
Comments

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

Enter Approver Comments			
<div></div>			
<input checked="" type="checkbox"/> Approve	<input type="checkbox"/> Deny	<input type="checkbox"/> Hold	<input type="checkbox"/> Pushback

[Return to Worklist](#)

PSA_POS Agency Approvals

eProcurement
March 19, 2018

ACTIONS & STATUSES

- **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 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

eProcurement
March 19, 2018

Confirmation

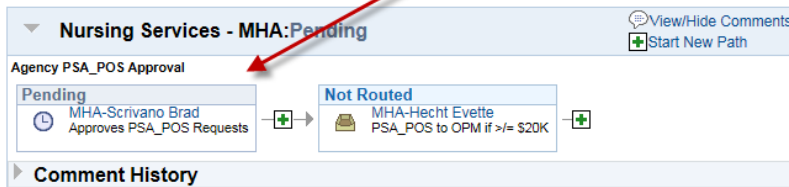
Your requisition has been submitted.

Requested For	MHA-Thrall Dee	Number of Lines	1
Requisition Name	Nursing Services - MHA	Total Amount	25,000.00 USD
Requisition ID	0000032056	Approval Justification	
Business Unit	MHAM1	Bud. Ref	2018
Status	Pending	Bid ID	18MHA32056
Priority	Medium		PSA Details
Budget Status	Not Checked		

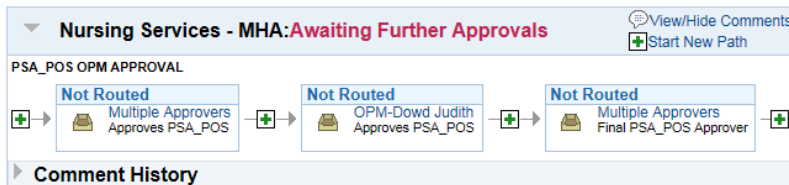
**Workflow has been
reinitiated.**

 View printable version  Edit This Requisition

Agency PSA_POS Approval



PSA_POS OPM APPROVAL



The Agency Service Approver must approve the requisition again.

PSA_POS Agency Approvals

eProcurement
March 19, 2018

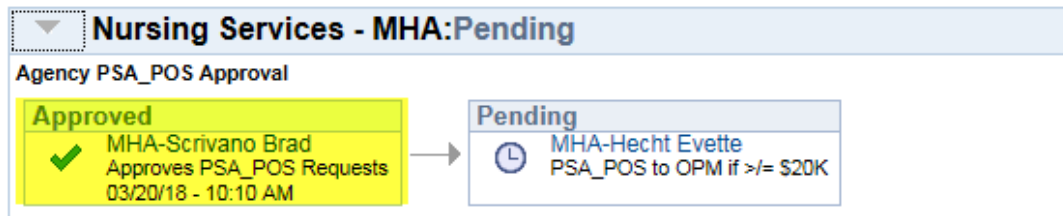
Requisition Approval

Confirmation

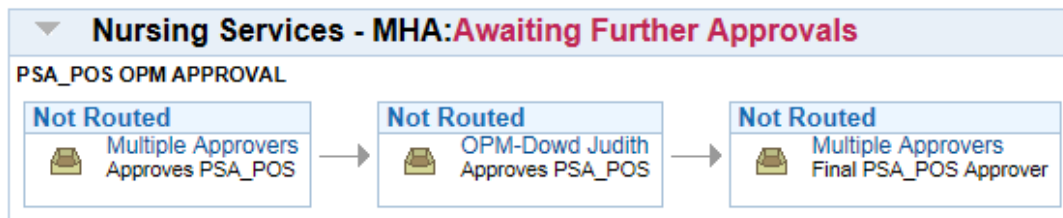
✓ **Nursing Services - MHA has been routed for further approval.**

Review/Edit Approvers

Agency PSA_POS Approval



PSA_POS OPM APPROVAL



[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

eProcurement
March 19, 2018

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.