

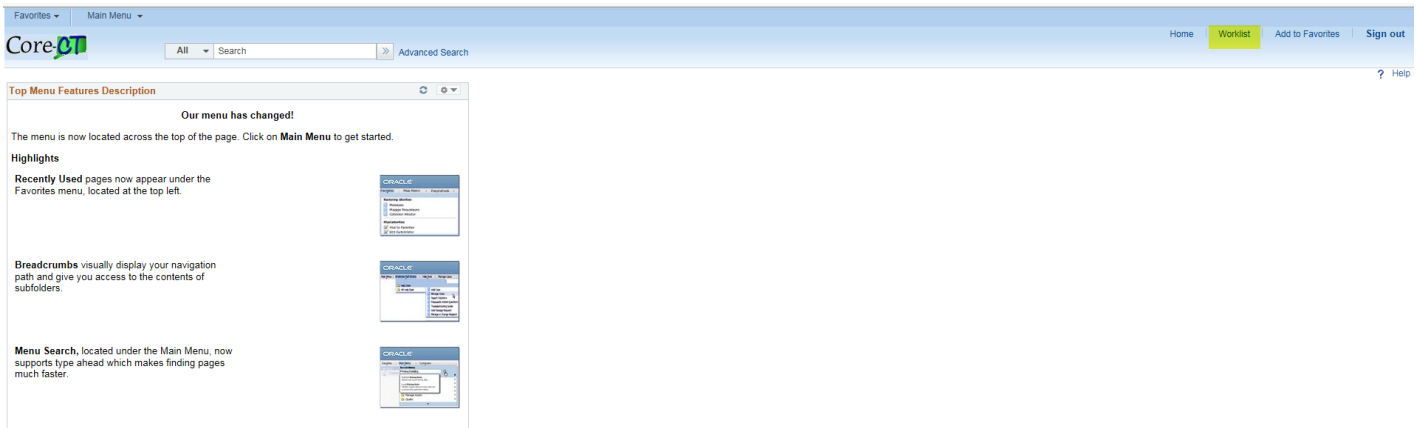


OPM PSA_POS Budget Approvals

eProcurement
February 15, 2018

Process for OPM Budget Approvers

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



- Worklist Displays

Worklist

Worklist for 127563: OPM-Lekarczyk Magdalena M

[Detail View](#) Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
MHA-Hecht Evette	01/11/2018	Approval Routing	Approval Workflow	2-Medium	Requisition 2557529, STATE, 2012-10-15, N, 0, BUSINESS UNIT:MHAM1, REQ ID:0000031710, OPM PSA POS APPROVER 1: 034155, EPLUS TECHNOLOGY INC, TEST, 21000000.	Mark Worked	Reassign
MHA-Hecht Evette	01/11/2018	Approval Routing	Approval Workflow	2-Medium	Requisition 2557532, STATE, 2012-10-16, N, 0, BUSINESS UNIT:MHAM1, REQ ID:0000031712, OPM PSA POS APPROVER 1: 034155, EPLUS TECHNOLOGY INC, TEST, 210000.	Mark Worked	Reassign
MHA-Hecht Evette	02/09/2018	Approval Routing	Approval Workflow	2-Medium	Requisition 2557604, STATE, 2012-10-16, N, 0, BUSINESS UNIT:MHAM1, REQ ID:0000031743, OPM PSA POS BUDGET APPROVER 1: 034155, ABILIS INC, nursing, 210000.		

[Refresh](#)


You can see who it is from.

You can see the requisition number, business unit vendor 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 [PSA Details Link](#)
- View Attachments by clicking on the comments bubble 

Requisition Approval

Business Unit [MHAM1](#)
Requisition ID 0000031743
Requisition Name [0000031743](#)
Requester MHA-Thrail Dee
Entered on 02/09/2018
Status Pending
Priority Medium
Budget Status Not Checked

Requisition Type PSA - Personal Service
Bid ID 18MHA31743
[PSA Details](#)


Total Amount [25,000.00 USD](#)

Requester's Justification
[This service is needed because....](#)
[Budget Reference 2018](#)

[Header Comments](#) [View printable version](#)

▼ **Line Information** [?](#)

Line Information [Personalize](#) | [Find](#) | [1](#) First 1 of 1 Last

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
<input type="checkbox"/>	2 Mental Health Services	ABILIS INC	1.0000	EA	25000.00000 USD	

☐ Select All / Deselect All
[View Line Details](#)

▼ **Review/Edit Approvers**

Requisition Line(s): To of 1 [Retrieve](#)

OPM PSA_POS Budget Approvals

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Agency PSA_POS Approval

Requisition 0000031743: **Approved** [View/Hide Comments](#)
[Start New Path](#)

Agency PSA_POS Approval

Approved

MHA-Scrivano Brad Approves PSA_POS Requests
02/15/18 - 8:32 AM

→

Approved

MHA-Hecht Evette PSA_POS to OPM if >= \$20K
02/15/18 - 8:32 AM

Comment History

MHA-Thrall Dee at 02/15/18 - 8:28 AM
[View History](#)

MHA-Thrall Dee at 02/15/18 - 8:27 AM
[View History](#)

PSA_POS OPM APPROVAL

Requisition 0000031743: **Pending** [View/Hide Comments](#)
[Start New Path](#)

PSA_POS OPM APPROVAL

Pending

Multiple Approvers Approves PSA_POS

→

Not Routed

OPM-Dowd Judith Approves PSA_POS

→

Not Routed

OPM-Dakers Robert Final PSA_POS Approver

Comment History

MHA-Thrall Dee at 02/15/18 - 8:28 AM
[View History](#)

MHA-Thrall Dee at 02/15/18 - 8:27 AM
[View History](#)

Enter Approver Comments

[Approve](#) [Deny](#) [Hold](#)

- 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](#) [First](#) [Last](#)

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
<input checked="" type="checkbox"/> 2	Mental Health Services	ABILIS INC	1.0000 EA	25000.00000	USD	View Line Details

☐ Select All / Deselect All

[View Line Details](#)

Review/Edit Approvers

Requisition Line(s): 1 [To](#) [Retrieve](#)

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

OPM PSA_POS Budget Approvals

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Business Unit: MHAM1		Requester: ThrallD		Status: Pending Approval	
Requisition: 0000031743		Requested By: MHA-Thrall Dee		Currency: USD	
Requisition Name: 0000031743		Entered Date: 2/9/18		Requisition Total: 25,000.00	
Header Comments: Header comments This service is needed because... Budget Reference 2018					
Line: 2	Item Description: Mental Health Services	Quantity: 1.0000	UOM: EA	Price: 25000.0000	Line Total: 25,000.00 Line Status: Pending
Line Comments: **Start Date:02-15-2018**End Date:02-20-2020					
Ship Line: 1		Ship To: 1510000059		Address:	
Attention: MHA-Thrall Dee		Due Date: 2/20/20		Shipping Quantity: 1.0000	
Ship Via: COMMON		Freight Terms: FOB DEST		Shipping Total: 25,000.00	
55 West Main Street Suite 410 Western Mental Health Network Waterbury LMHA Waterbury CT 06702 United States					
Dist	Status	Location	Qty	PCT	Amount
1	Open	ACORE	1.0000	100.00	25,000.00
GL Unit	Account				
STATE	54060				
Dept	Fund	Program	Class	Budget Ref	
MHA53187	12060	00000	21782	2018	
Open QTY	PC BU	Project	Open Amt		
0.0000	NONPC	MHA_NONPRO JECT	25000.000		
GL Base Amount	Currency	Sequence	Capitalize		
25,000.00	USD	0	N		

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

OPM PSA_POS Budget Approvals

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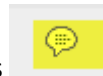
Personal Service Agreement PSA

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

Add Attachments

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




OK Cancel

OPM PSA_POS Budget Approvals

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

Enter Approver Comments

 Approve  Deny  Hold

[Return to Worklist](#)

- A. **Approve** the requisition and it routes to the next approver in Workflow
 - Req. Status Pending
- B. **Deny** the requisition requires a comment and gets routed back to the PSA_POS Requester
 - Req. Status Denied
- C. **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

eProcurement
February 15, 2018

Requisition Approval

Confirmation


✓ 0000031743 has been routed for further approval.

Review/Edit Approvers


Agency PSA_POS Approval

▼
Requisition 0000031743:Approved
View/Hide Comments

Agency PSA_POS Approval

Approved

MHA-Scrivano Brad
Approves PSA_POS Requests
02/15/18 - 8:32 AM

→

Approved

MHA-Hecht Evette
PSA_POS to OPM if >= \$20K
02/15/18 - 8:32 AM

Comment History


MHA-Thrall Dee at 02/15/18 - 8:28 AM
[View History](#)

MHA-Thrall Dee at 02/15/18 - 8:27 AM
[View History](#)


PSA_POS OPM APPROVAL

▼
Requisition 0000031743:Pending
View/Hide Comments


PSA_POS OPM APPROVAL


Approved

OPM-Lekarczyk Magdalena M
Approves PSA_POS
02/15/18 - 9:21 AM

→

Pending

OPM-Dowd Judith
Approves PSA_POS

→

Not Routed

OPM-Dakers Robert
Final PSA_POS Approver

Information Request

MHA-Thrall Dee
Information Request

Comments

OPM-Lekarczyk Magdalena M at 02/15/18 - 9:20 AM
Add an attachment

Comment History

MHA-Thrall Dee at 02/15/18 - 8:28 AM
[View History](#)

MHA-Thrall Dee at 02/15/18 - 8:27 AM
[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...

OPM PSA_POS Budget Approvals

eProcurement
February 15, 2018

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.