



POS AND PSA REQUISITIONS IN CORE-CT

WEDNESDAY SEPTEMBER 22, 2021

TODAY'S TRAINING ROADMAP

1. What is a requisition and why is it important?
2. How to use Core-CT e-Procurement module
3. OPM/Budget review and approval process
4. OPM/Finance review and approval process
6. Questions and answers



WHAT IS A REQUISITION?

FORMAL ENTRY IN CORE TO INITIATE A TRANSACTION ASSOCIATED WITH A POS OR PSA

- Submissions required for RFPs, new contracts, and amendments
- Documents the approval process to demonstrate compliance with agency and statutory requirements
- Ensure financial system has up-to-date information

WHY DOES OPM REVIEW REQUISITIONS?

- Budget
 - Ensure request is supported by state budget/available additional funds
 - Ensure consistency with executive and legislative policy
- Finance
 - Ensure proper procurement procedures are followed
 - Ensure contracting activity is reasonable - data reported on annually





USING THE CORE-CT E- PROCUREMENT MODULE

FOR POS AND PSA

Core-CT
 All Search Advanced Search

Define Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv.
 *Requester: FraserL MHA-Fraser Leona
 *Currency: USD
 Card Number:
 Expiration Date:
 Use Procurement Card

Requisition Name: TEST PSA_POS
 Priority: Medium
 Requisition Type: PSA - Personal Service

PSA Details

Default Options
 Default
 Override

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:
 Supplier Location:
 Buyer:
 Category:
 Unit of Measure:

Shipping Defaults
 Ship To: 1510000059
 Due Date:
 Attention:
 Add One Time Address:

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	ChartField 1	ChartField
1		ACORE	STATE				MHA53850						

OK Cancel

STEP 1: DEFINE THE REQUISITION

- PSA Details
- Line Details
- Shipping is defaulted
- Chartfields can be defaulted

STEP 2: ADD ePRO SERVICES

- Service description
- Value of service
- Supplier
- Start and end dates

Create Requisition ?

Welcome OSC-Bonola Kathleen M

Define Requisition

Home

0 Lines

Add Items & Services

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

Favorites Main Menu eProcurement Requisition

ORACLE

Create Requisition ?

Welcome OSC-Bonola Kathleen M 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 IT Personal Services

*Value of Service 100000.00 *Currency USD

*Category 42000000

Supplier ID 0000064731 Suggest New Supplier

Supplier Name EPLUS TECHNOLOGY INI

*Start Date 09/01/2021 *End Date 09/01/2023

Quote Number XYZ Quote Date

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

Core-CT Search

My HR | Finance | Core-CT Help | STARS

Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: State Comptroller's Office
 *Requester: OSC-Bonola Kathleen M
 *Currency:

Define Requisition

Requisition Name:
 Priority:
 Requisition Type:
PSA Details

Cart Summary: Total Amount 100,000.00 USD

Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	IT Personal Services		EPLUS TECHNOLOGY INC	1	Each	100000.00	100000.00		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Select All / Deselect All **Select lines to:**

Total Amount 100,000.00 USD

Shipping Summary

Ship To Location 0640000561
Address 55 FARMINGTON AVENUE
 8TH FLOOR
 INFORMATION TECHNOLOGY
 HARTFORD, CT 06105
Attention To OSC-Bonola Kathleen M
Comments

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

STEP 3: SAVE AND SUBMIT

- Shopping cart checkout
- Review and submit
- Save and submit

JOB AIDS

LOGIN

SELF-SERVICE
HRMS
FINANCIALS
EPM
SECURITY
TRAINING
DAILY MAIL
CATALOG OF REPORTS
STARS



eProcurement

[ePro FAQs](#)

[Ad Hoc Job Aid](#) **NEW**

[Add, Share, Delete Templates](#)

[Catalog, Searching the State](#)

[Coding an Asset in ePro](#)

[Converting Req to Contract](#)

[Creating Multiple Distributions](#)

[ILT Exercises](#)

[ILT Presentation](#)

[Introduction to eProcurement](#) **NEW**

[Mass Change Link, Using](#)

[PSA POS Agency Approval](#)

[PSA POS OPM Budget Approval](#)

[PSA POS Training Presentation](#) **NEW**

[Requisition Methods](#)

[Requisition Supplier Location Job Aid](#)

[Scheduling eProcurement Reports](#)

[Sourcing Workbench](#)

[Standardization Transaction Less Than 50K](#)

[Suburban Order Manual for Punch Out](#)

[GSA Contracts - Using](#)

Types of Requisitions

[DAS Bid](#)

[ITD-10](#)

[PSA POS Requisition](#)

[PSA POS Amendment](#)

[PSU \(Product Schedule Update\)](#)

[Requisitions](#)

[TSR-Equipment](#)

[TSR MACR \(Move, Add, Change, Repair\)](#)

Link: <https://www.core-ct.state.ct.us/financials/epro/Default.htm>

MORE HELP



HRMS/FINANCIALS/REPORTING SYSTEM

Home About Us Help Contact

Help

Hours of System Operation:
Monday - Sunday 4:00am - 8:00pm
HRMS Confirm Thursday 4:00am - 2:00pm

General Contact Information:

- Please direct all Requests for Service or inquiries to the FootPrints Help Desk Application for Core-CT using the following link: <http://footprints.ct.gov/footprints>
- Subscribe to [Daily Mail: Core-CT Communication Bulletins](#)
- If you are already logged in to the Core-CT HRMS/Financial system, you can access the Core-CT website procedures and job aids by clicking on the Core-CT Help tab from any page.

Favorites ▾ Main Menu ▾

Core-CT All Search Advanced Search

My HR Finance **Core-CT Help**

Core-CT Help Desk

- [Log a ticket / Request for Service](#)
- [Troubleshooting Footprints Access](#)
- FootPrints Help Desk Instructions:
 - How to Log in / Log out (click [here](#) to locate your Agency to determine the appropriate log in instructions. This will vary depending on how you log in at your agency.)
 - [Submit a Ticket](#)
 - [How to Search and View a Ticket](#)
 - [How to Update a Ticket](#)
 - [How to Subscribe to a Global Ticket](#)
 - [For IT Staff / How to Switch Workspaces](#)

Link: <https://www.core-ct.state.ct.us/help.html>



OPM/BUDGET REVIEW PROCESS

FOR POS AND PSA

OPM/BUDGET REVIEW PROCESS



Determine requisition type



Identify vendor, funding source (Fund/Class), term



Verify amounts are consistent across requisition



Compare amounts to current/prior year financial documents



Follow up with agency



Analyst → Section Director → OPM/Finance

HOW TO ENSURE QUICK APPROVAL

OPM/Budget

- Clear introductory sentence explaining purpose for request.
- Amounts listed by FY, Fund/Class in comments
- Analyst regularly receives source financial documents
- Advance contact on significant requests
- Vendor name included in requisition name to facilitate searches



QUICK APPROVAL – OPM BUDGET



All

Search



Advanced Search

My HR

Finance

Core-CT Help

STARS

Requester's Justification

Reason for Amendment:

The Department has recently undertaken a review and reconciliation of our contracts to ensure that the information in the contract accurately reflects the programs that we believe we're contracting for. This amendment is being processed to update information stated within the current contract. This amendment is being processed to update capacity and staffing information stated within current contract

Description of Service:

Family Based Recovery - This service is an intensive, in-home clinical treatment program for families with infants or toddlers (birth to 36 months) who are at risk for abuse and/or neglect, poor developmental outcomes and removal from their home due to parental substance abuse. The overarching goal of the intervention is to promote stability, safety and permanence for these families. Treatment and support services are provided in a context that is family-focused, strength-based, trauma-informed, culturally competent, and responsive to the individual needs of each child and family. The clinical team provides intensive psychotherapy and substance abuse treatment for the parent(s) and attachment-based parent-child therapy to the parent-child dyad.

Intimate Partner Violence - Family Assessment Intervention Response (IPV-FAIR) - This service establishes a comprehensive response to intimate partner violence that offers meaningful and sustainable help to families that is safe, respectful, culturally relevant and responsive to the unique strengths and concerns of the family. This service provides a supportive service array of assessments, interventions and linkages to services to address the needs of families impacted by intimate partner violence. The service will respond to both caregivers and the children. Safety planning will be at the center of the service provision.

MST - Building Stronger Families - This service, using a national evidence-based treatment model, provides intensive family and community based treatment to families that are active cases with (DCF) due to the physical abuse and/or neglect of a child in the family and due to the abuse of or dependence upon marijuana and/or cocaine by at least one caregiver in the family. Core services include: clinical services, empowerment and family support services, medication management, crisis intervention, case management and aftercare. Average length of service is 6 - 8 months per family.

Parenting Support Services - This is a service for families with children 0-18 years-of-age to support and enhance positive family functioning. Families receive one or more of the PSS interventions along with case management services using the Wraparound philosophy and process. PSS offers the evidenced-based model, Level 4 Triple P (Positive Parenting Program®) and the Circle of Security Parenting® intervention. Triple P helps parents become resourceful problem solvers and be able to create a positive and safe home learning environment for children to develop emotional, behavioral, and cognitive strengths. Circle of Security Parenting (COS) is designed to build, support, and strengthen parents' relationship capabilities so they are better equipped to provide a quality of relationship that is more supportive of secure attachment. If needed, families may receive more than one PSS intervention.

Funding:

Family Based Recovery:

SFY22:11000/16116/43144/ \$0

SFY23:11000/16116/43144/ \$0

Intimate Partner Violence: Family Assessment Intervention Response (IPV-FAIR):

SFY22:11000/16097/28006/ \$0

SFY23:11000/16097/28006/ \$0

Multisystemic Therapy (MST) - Building Stronger Families:

SFY22:11000/16141/43146/ \$0

SFY23:11000/16141/43146/ \$0

Parenting Support Services:

SFY22:11000/16064/28012/ \$0

SFY23:11000/16064/28012/ \$0



OPM/FINANCE REVIEW PROCESS

FOR POS AND PSA

OPM/FINANCE REVIEW PROCESS



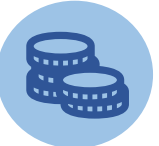
Review requisition type and justification



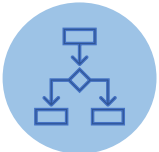
Review POS/PSA details and any comments and attachments



Compare request with agency procurement plan



Compare amounts to current/prior year spend



Ensure correct approval process was followed



If the request is over \$1 million, Kimberly Kennison must approve

HOW TO ENSURE QUICK APPROVAL

OPM/Finance



- Avoid acronyms and department-specific language - assume I don't know anything about your program
- Use the priority line to indicate urgency
- Do not request amendments for contracts that have already expired
- Provide **MORE** information in the waiver justification box - do not repeat the text of the waiver code
- Attach comments or additional documents to provide further information
- Provide explanation for significant increases in funding

QUICK APPROVAL – OPM FINANCE

Budget Status Valid

POS Details

Requester's Justification

Reason for Waiver:

The Fetal Alcohol Spectrum Disorder (FASD) and Substance Exposed Infants (SEI) Statewide Coordination program is dually funded by DCF and DMHAS. DMHAS included the FASD Coordinator work under an existing contract with Wheeler Clinic. DCF also contracts with Wheeler Clinic in order to oversee and fund the program. Given the opioid crisis, both DMHAS and DCF critically need this position to be filled and maintained.

Reason for Amendment:

Position requested for a Plan of Safe Care Navigator. An additional staff person is needed to train hospitals, community providers, create a database, conduct outreach and assist in marketing and track activities with marketing. We are requesting \$80,000 for the new position and \$6,000 to include for Marketing materials. Equaling a total of \$86,000

QUICK APPROVAL – OPM FINANCE

Waiver from Competitive Solicitation POS

Explain the process used to determine the rate that will be paid to the contractor.

In order to estimate the cost of this program, the Department has used the budgeted cost of a similar program at a comparable DOC facility. This program has a budgeted cost of \$250,000 per year. If the OPM approves this sole source request, the Department will work with the proposed contractor on an actual budget to provide services at Garner Correctional Institution.

Yes No Is this request in compliance with the procurement plan?

Yes No Is this a renewal?

If yes, provide the following information:

Contract ID: _____

Contract Type: _____

Supplier ID: _____

Begin Date: _____

Maximum Amount: _____

Total # of years: _____

Date of last Renewal: _____

Explain in detail the reasons for requesting a waiver from competitive solicitation and how it applies.

Yes No The cost to the State is less than the cost of competitive solicitation. (Note: This category is only applicable for services provided by a contractor mandated by the CT General Statutes, a public act, or a special act.)

Yes No Supplier is mandated by the CT General Statutes, a public act, or a special act.

Yes No Services provided are essential to the health, safety, or welfare of the community.

Yes No Evidence based on a cost-benefit analysis.

Yes No Services and location are unique to the State.

Yes No Specific supplier is required by the CT General Statutes, a public act, or a special act.

Yes No Hospitals and Urgent Care Services are required by the CT General Statutes, a public act, or a special act.

Yes No Zoning, citing & other local regulations apply.

Following Waiver Codes discovered:

Yes No Services will be provided by a contractor mandated by the CT General Statutes, a public act, or a special act.

Yes No Contractor will provide emergency services, including those needed for the protection of life or health.

Yes No Contractor has special capability or unique experience.

Waiver from Competitive Solicitation POS

DOC is requesting a waiver from competitive solicitation in order to contract with Recovery Network of Programs, Inc. to provide Medication for Opioid Use Disorder (MOUD) services at Garner Correctional Institution (Garner). DOC intends to fund these MOUD services with Federal SAMHSA dollars passed through from DMHAS. DMHAS' State Opioid Response (SOR) grant is to address the State of CT opioid crisis. The new SOR Federal funding and carryover approval from DMHAS is still in process. These funds will be specifically earmarked in the agreement between DOC and DMHAS for MOUD services at Garner.

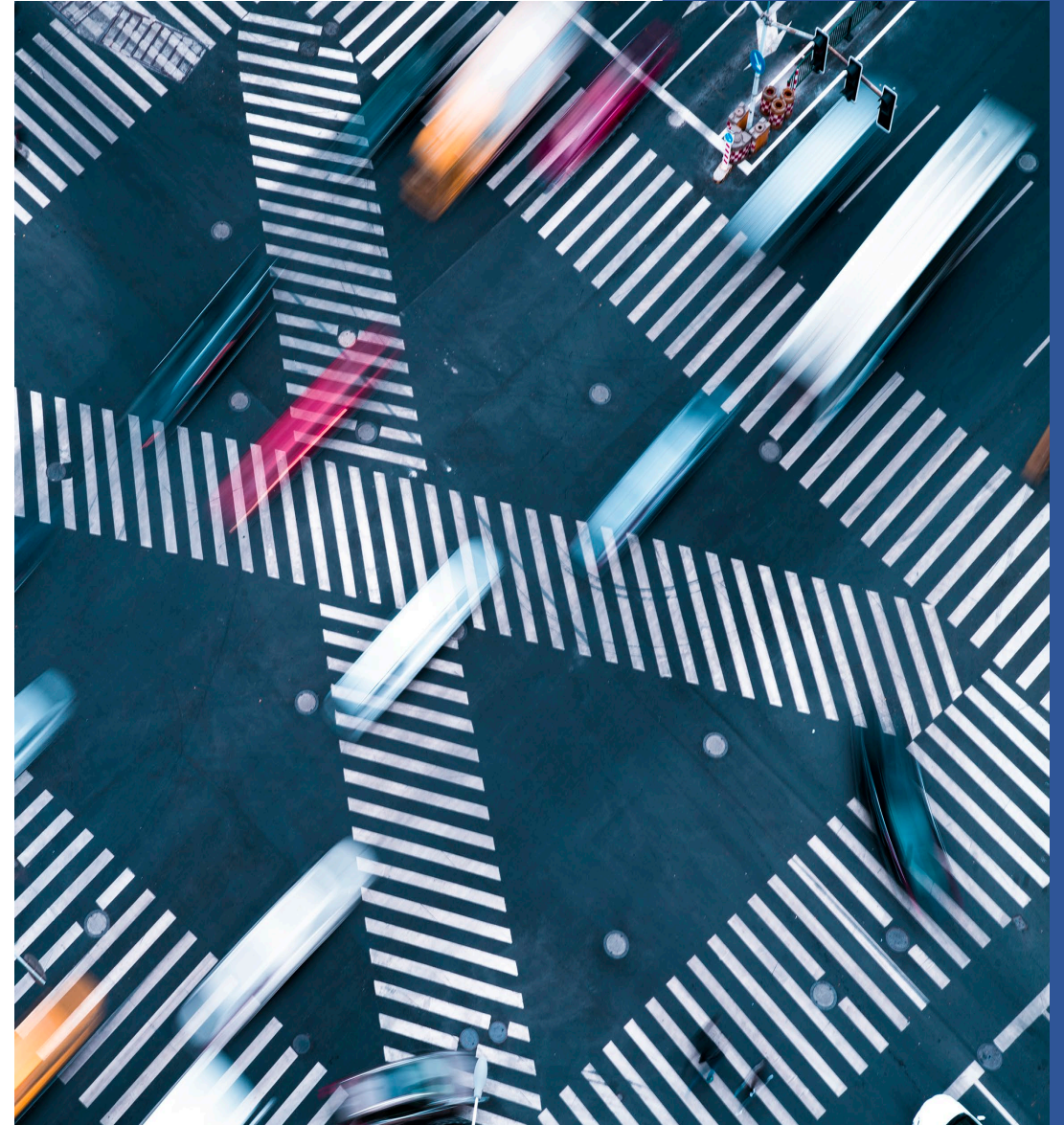
Garner houses male offenders with significant mental health issues. Since Garner does not provide MOUD services currently, inmates that have mental health issues and require MOUD services are not able to be placed in Garner along with the appropriate population. Bringing these inmates back to Garner where they can also be treated for MOUD would help to create a continuity of care. RNP would provide MOUD services to approximately 15 inmates per day, including medication maintenance, induction services and re-entry services.

RNP is the current MOUD provider at Bridgeport Correctional Center (BCC), which is in close proximity to Garner. RNP would be able to dispense required medications at BCC and easily transport them to Garner for distribution to inmates. It would be a smooth transition and the easiest way to provide Garner inmates the proper care. RNP has been successfully serving the DOC inmate population for a number of years and in the past year has become a fully licensed Opioid Treatment Provider at BCC. Considering the time and energy it takes to get these programs up and running, it would be beneficial to the Department to sole source the start up of this program with these Federal funds and then competitively bid this facility along with the others in accordance with the DOC Procurement Plan in 2024.

Return

WHEN DO WE “HOLD” A REQUISITION?

- Budget
 - Follow-up questions
 - Pending determination of funding availability
 - Policy implications under consideration
- Finance
 - Questions about funding or program
 - Concerns about non-competitive procurement
 - Errors in the requisition



ADDITIONAL RESOURCES

Core CT

[Job Aids](#)

[Core Help Page](#)

OPM/Budget

[List of budget analysts by agency](#)

OPM/Finance

[OPM Finance Training materials](#)

QUESTIONS AND ANSWERS

A photograph of the Wisconsin State Capitol building, featuring a prominent central dome and Gothic Revival architecture. The building is partially obscured by large, leafy trees in the foreground. A semi-transparent blue rectangular overlay covers the upper two-thirds of the image, with the text "THANK YOU!" centered in white. The sky is a clear, bright blue.

THANK YOU!