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

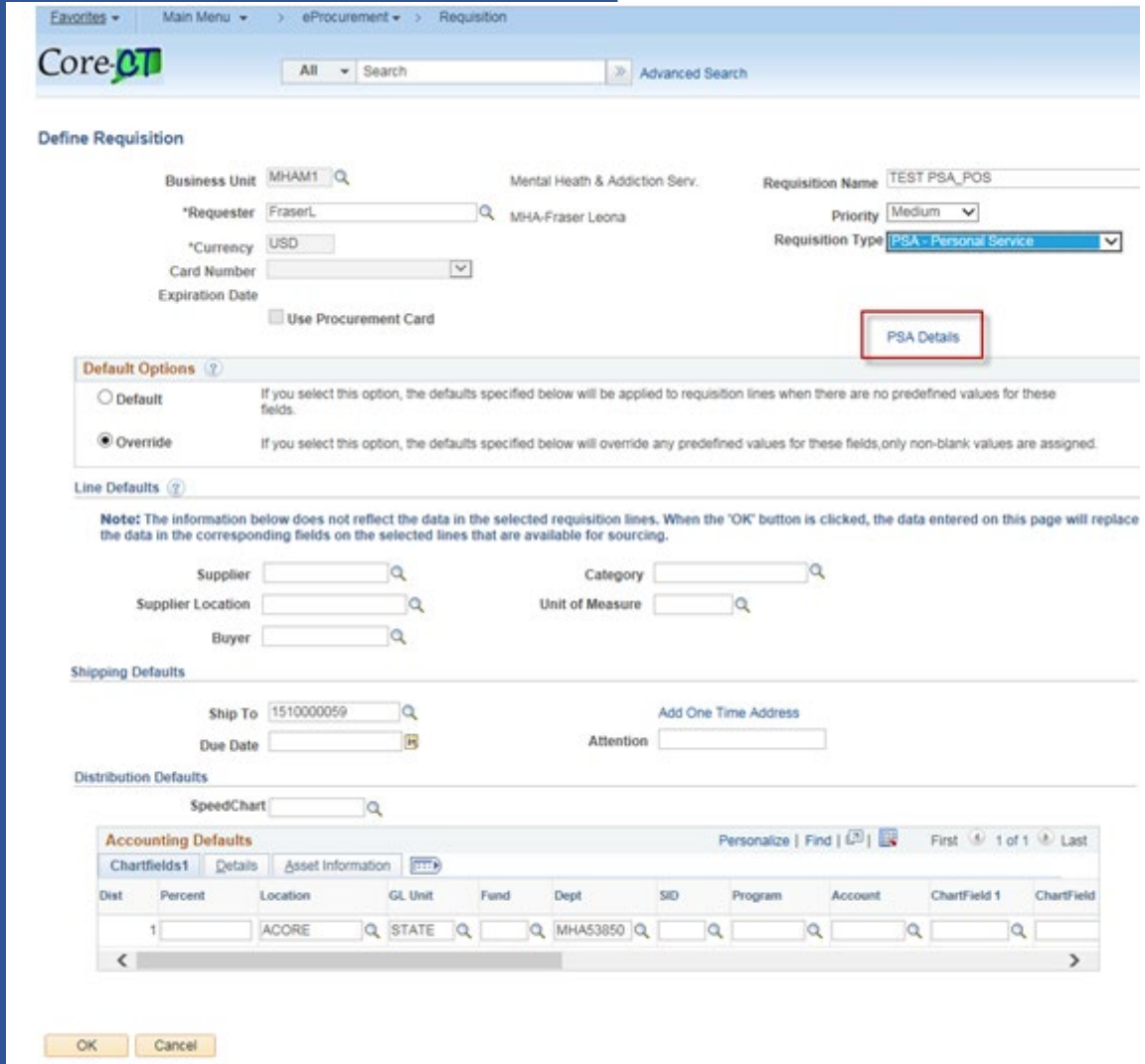
- Submissions required for RFPs, new contracts, and amendments
- Documents the approval process to demonstrate compliance with agency and statutory requirements
- Ensure financial system has up-to-date information

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

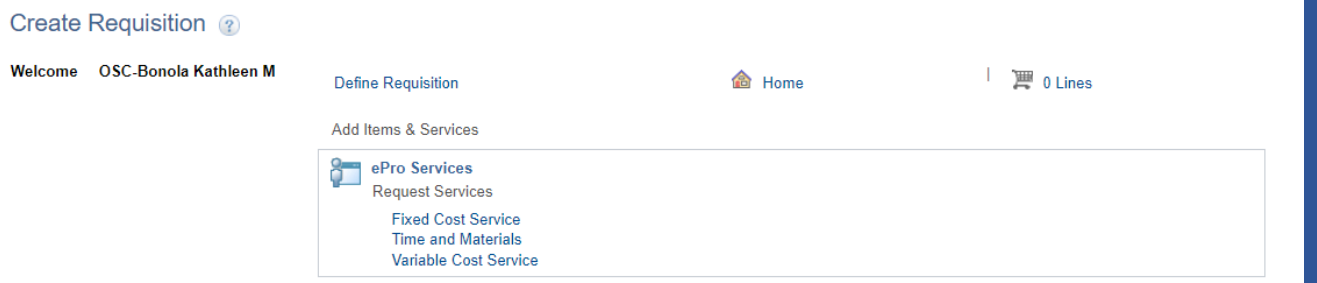


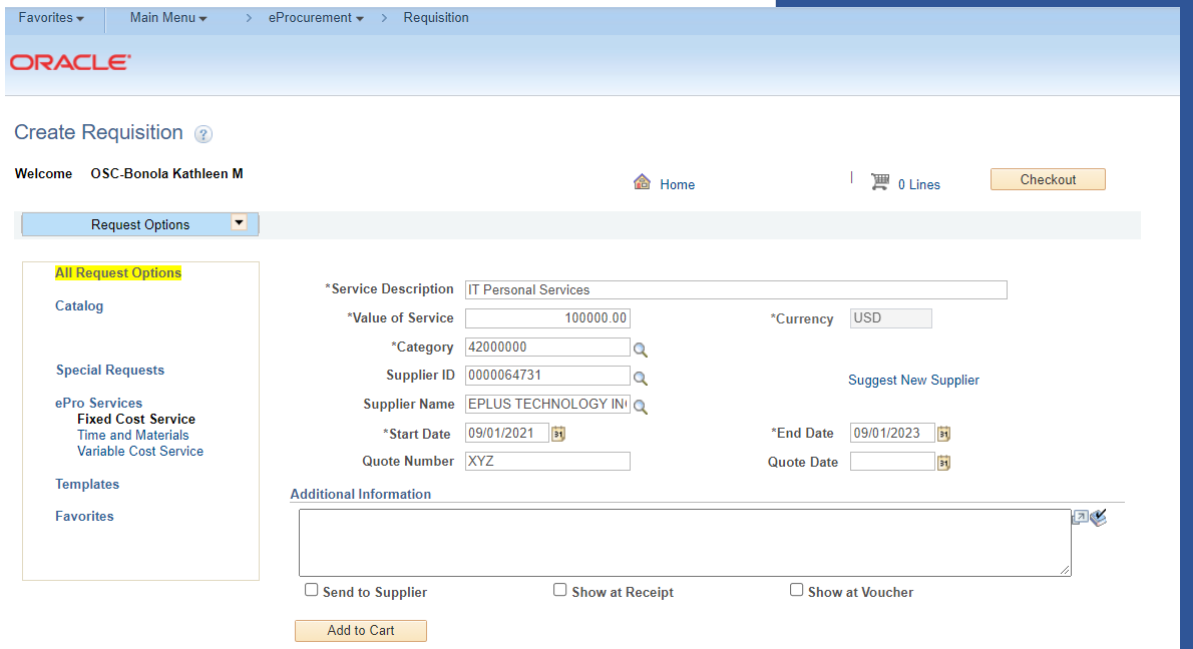
STEP 1: DEFINE THE REQUISTION

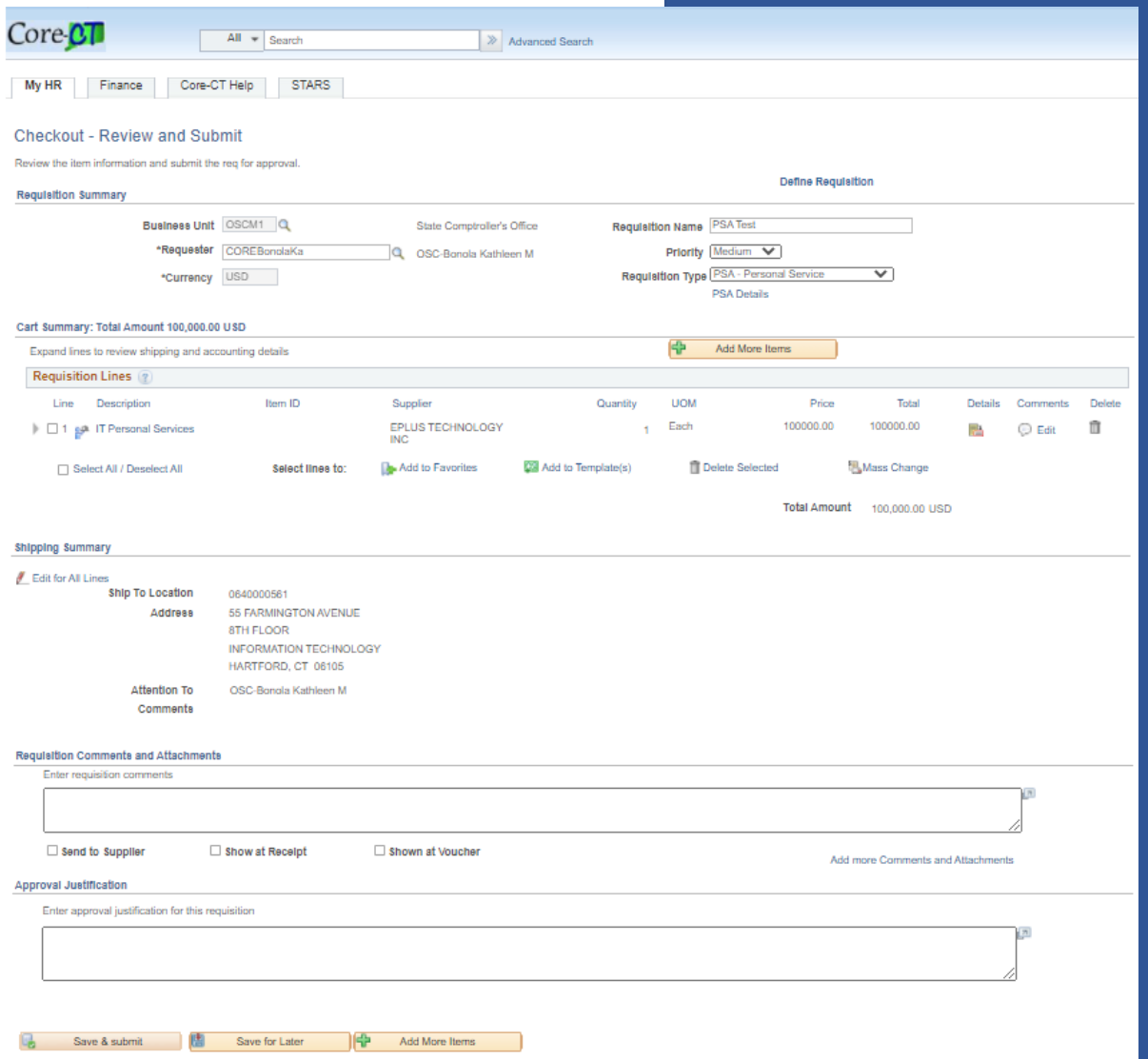
- PSA Details
- Line Details
- Shipping is defaulted
- Chartfields can be defaulted

STEP 2: ADD ePRO SERVICES

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







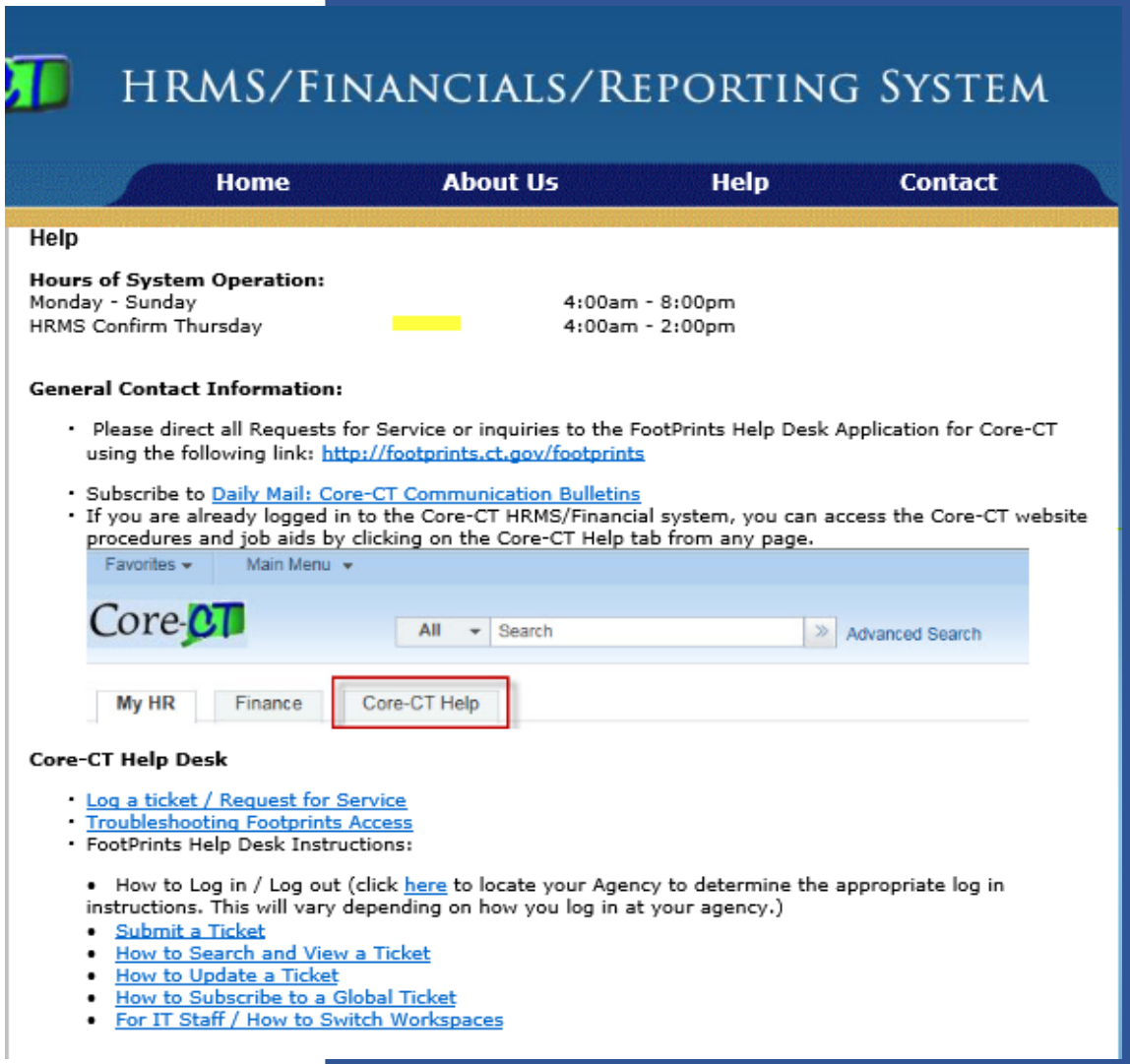
STEP 3: SAVE AND SUBMIT

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

JOB AIDS

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

MORE HELP



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

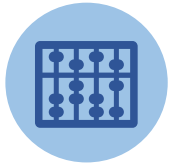
OPM/BUDGET REVIEW PROCESS

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

Core-CT | 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

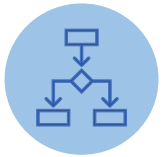
OPM/FINANCE REVIEW PROCESS

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

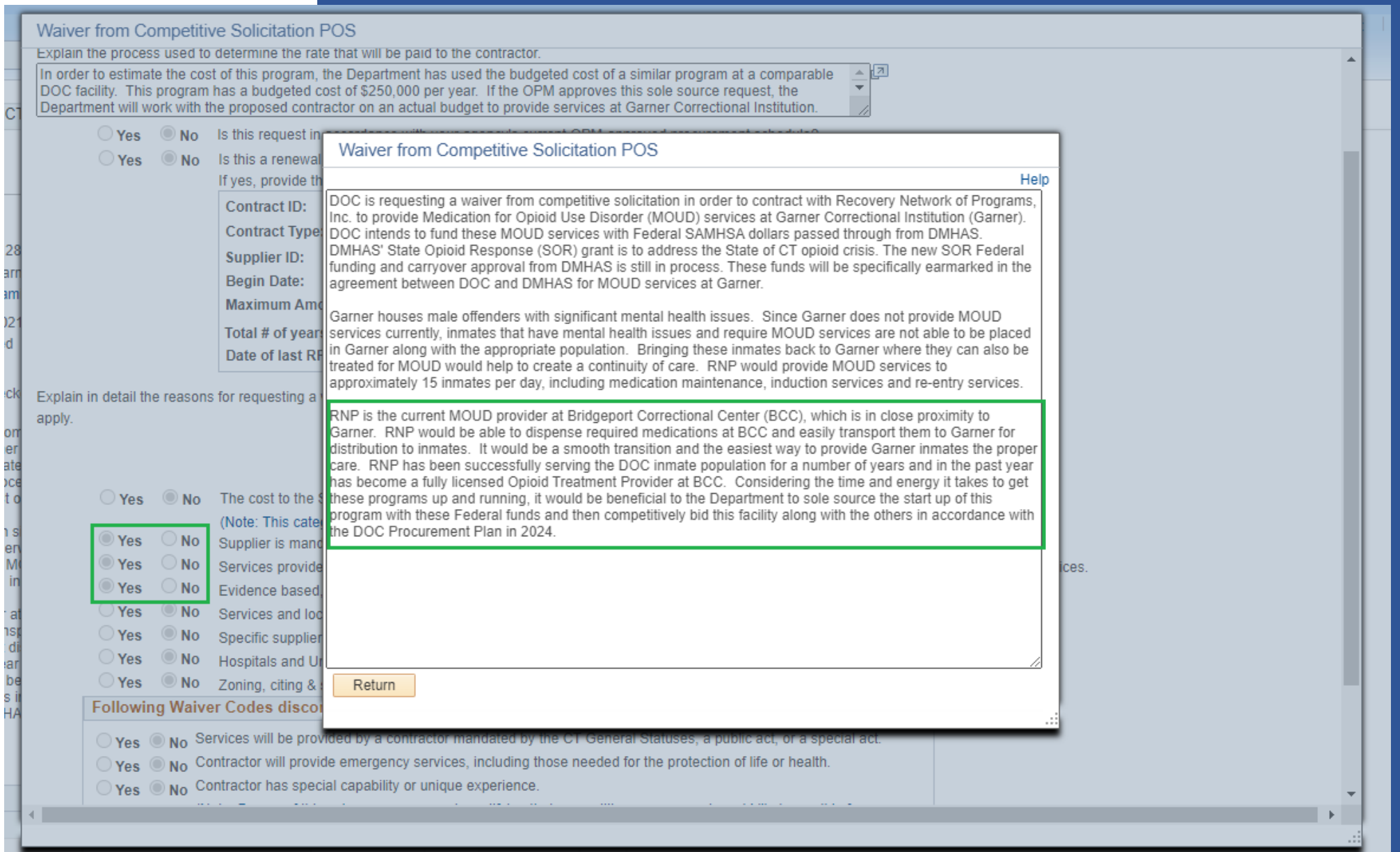
Budget Status Valid POS Details

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



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	OPM/Budget	OPM/Finance
Job Aids Core Help Page	List of budget analysts by agency	OPM Finance Training materials

QUESTIONS AND ANSWERS

THANK YOU!