Procedures for Processing Sole Source Documents for <u>Services</u>

The agency will prepare and complete the online Source Justification Form and submit to DGS after they have completed the SPR process and included all of the required attachments.

<div style="border: 3px solid navy;">

Department of General Services

SOURCE JUSTIFICATION FORM

Bureau of Procurement

The objective of this form is to capture all relevant documentation an Agency may have to assist the Department of General Services ("DGS"), Bureau of Procurement, in expediting the source justification review process. This form must be completed electronically, signed, and submitted with all relevant documentation to DGS. If a question is neither mandatory nor applicable, please indicate "N/A". Please use standard terminology and define acronyms.

* = Required.

⦿ New Form   ○ Edit Form

</div>

The DGS sole source coordinator will be notified via e-mail that a New Source Justification Form was submitted. DGS sole source coordinator will review the request for completeness and will either accept or reject it. The Sole Source Coordinator will make sure that the form is correct before assigning to Commodity Specialist.

The request will appear for 10 days on the website after it is accepted for public viewing.

<div style="border: 3px solid navy;">

-----Original Message-----
From: paemarketplace@state.pa.us [mailto:paemarketplace@state.pa.us]
Sent: Friday, January 23, 2009 9:49 AM
To: Reinoehl, Brian
Subject: A New Source Justification Form was Submitted.

A New Source Justification Form was Submitted. It can be found on eMarketplace. You must Login before approving. ID# 199

</div>

The Agency will be notified via e-mail of the status of their request.

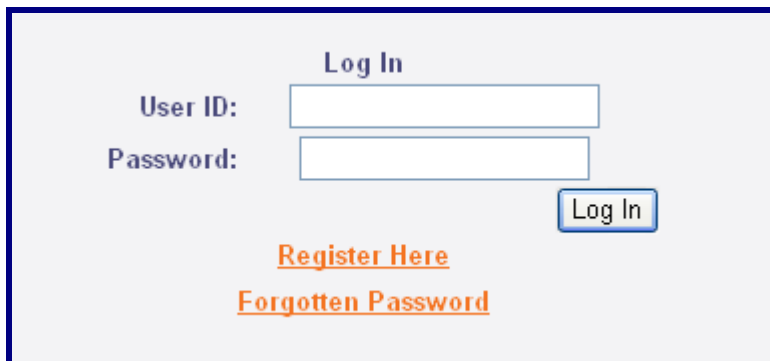<div style="border: 3px solid navy;">

-----Original Message-----
From: paemarketplace@state.pa.us [mailto:paemarketplace@state.pa.us]
Sent: Friday, January 23, 2009 9:57 AM
To: Plecker, Susan
Cc: Cain, Barbara
Subject: Source Justification Form.

Your source justification for Sue's test 01/23/09 has been accepted and is under review. Your ID# is 199.

</div>

If the Source Justification Form is accepted, the sole source coordinator will assign it electronically to a Commodity Specialist.

The Commodity Specialist will receive an e-mail stating that a Source Justification Form was accepted. The e-mail will provide ID # for reference when accessing the website.
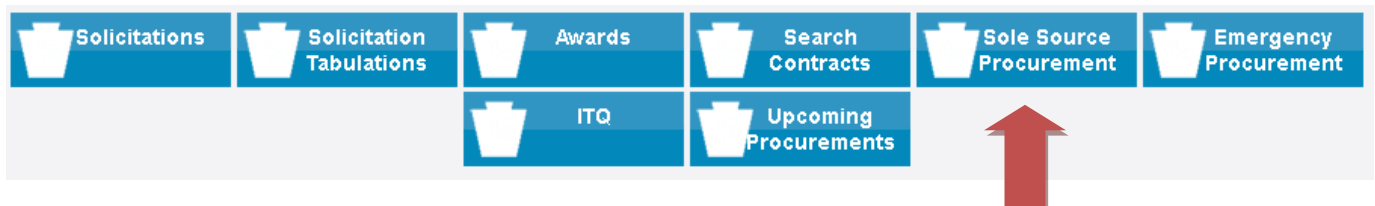
Procedures for Processing Sole Source Documents for <u>Services</u>

Commodity Specialist should log in to eMarketplace with the user id & password they created when they registered.

Once logged in, select the Sole Source Procurements link on eMarketplace.

Locate correct ID # and select the Details link.

| 190 | test | Administration | name | $5K - $10K | TBD | Details |

Commodity Specialist will review Source Justification Form. The form can be downloaded and printed, if necessary. However, paper documents will no longer be routed.

Commodity Specialist will complete a Sole Source Determination Summary Sheet and Activity Timeline and save to their computer. Please note that the Sole Source Determination Summary Sheet will be available for public viewing, so be clear and concise.

Revised 2-3-11

The Summary Sheet must be uploaded to the website. Start by selecting the "Edit" button.

Select "Browse"

Locate completed form on the computer and select open.

Revised 2-3-11

Select "Upload"

Your attachments will appear on the left side of the screen. Select "Update"

Upon completion of your **approved** recommendation, the Commodity Specialist:
- Routes the sole source to their Associate Commodity Manager (or CM).
- The Associate Commodity Manager (or CM) should review the sole source and then,
  - o If approved the Associate Commodity Manger will have the Commodity Specialist electronically approve the sole source.
- After 10 days from the sole source acceptance date where the sole source was posted to eMarketplace; and if approved, an auto-generated email will route to the sole source coordinator and subsequently to other approvers based on the dollar amount of the Sole Source request to review and approve.
  - o You <u>do not</u> need to route to the sole source coordinator to let them know you approved.

Procedures for Processing Sole Source Documents for <u>Services</u>

If disapproved, the Commodity Specialist:
- Attaches their disapproved determination summary to the electronic request.
  - Do <mark>Not</mark> click the CS approved button. *Currently No Disapproved button is available at this time. This will be a future enhancement to the system.*
- Routes to their Associate Commodity Manager (or CM) for review.
  - ACM/CM and CS to notify the Agency of the disapproval prior to notifying the Sole Source Coordinator.
    - Notification <mark>must</mark> include a telephone conference call or face to face meeting with the agency.
- If the Associate Commodity Manager (or CM) is in agreement for disapproval,
  - ACM or CM notifies the Sole Source Coordinator to disapprove based on the Commodity Specialist recommendation as specified in the Sole Source Determination Summary Sheet. Confirm agency has already been notified of the disapproval.

Upon final determination the agency will receive an e-mail regarding the status of the request.

Revised 2-3-11