

Procedures for Processing Sole Source Documents for Services

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.

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.	
<input checked="" type="radio"/> New Form <input type="radio"/> Edit Form	

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.

-----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

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

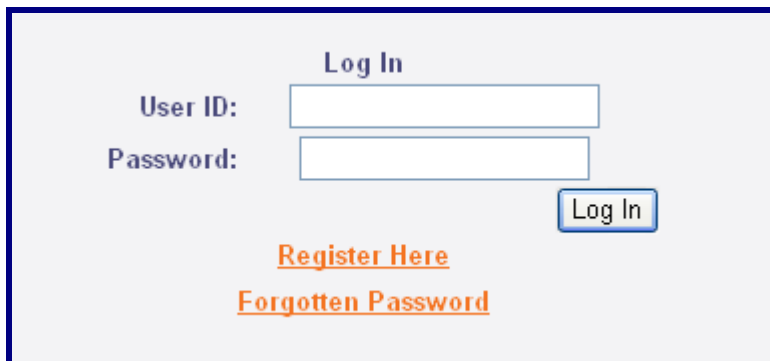
-----Original Message----- From: paemarketplace@state.pa.us [mailto:paemarketplace@state.pa.us] Sent: Friday, January 23, 2009 9:57 AM To: Plecker, Susan Cc: Cain, Barbara Subject: Source Justification Form. Your source justification for Sue's test 01/23/09 has been accepted and is under review. Your ID# is 199.
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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.

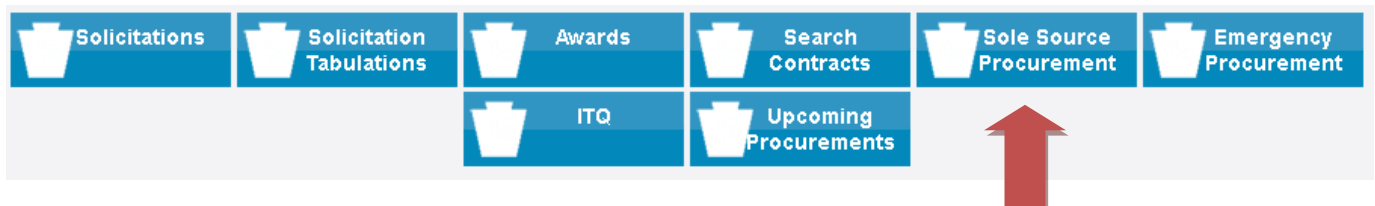
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Commodity Specialist should log in to eMarketplace with the user id & password they created when they registered.



The login form is titled "Log In" and contains two input fields: "User ID:" and "Password:". Below the password field is a "Log In" button. At the bottom of the form, there are two links: "Register Here" and "Forgotten Password".

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



The "Review Information" form displays the following details:


ID:	191	PO#:	
Review End Date:		Approval Status:	
		Submitted:	1/21/2009
Approval/Disapproval Date:		Accepted:	01/21/2009
Awarded \$ Amount:	\$	Execution Date:	
		Related Docs:	

Below the table, there are two links: "View Source Justification Form" (highlighted with a red box) and "Download form as PDF". At the bottom right, there is an "Edit" button.

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.

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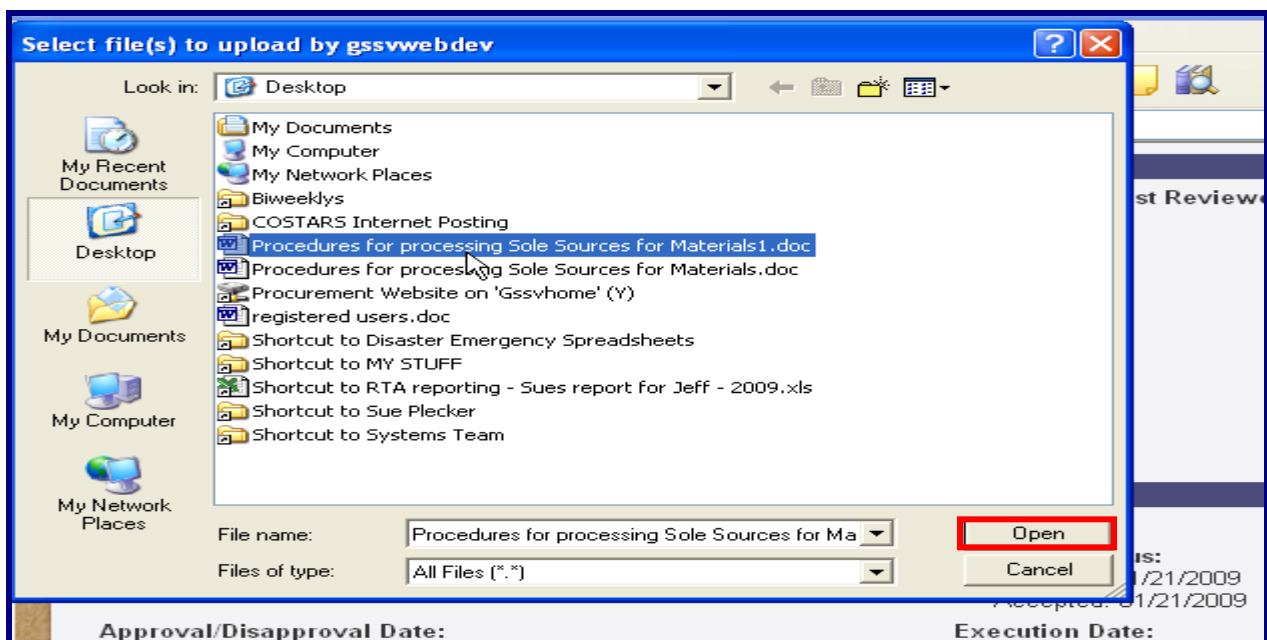
The Summary Sheet must be uploaded to the website. Start by selecting the “Edit” button.

Review Information	
ID:	191
Review End Date:	
Approval/Disapproval Date:	
Awarded \$ Amount:	\$
View Source Justification Form Download form as PDF	
	

Select “Browse”

Review Information			
ID:	191	PO#:	<input type="text"/>
Review End Date:	<input type="text"/>	Approval Status:	<input type="text"/>
		Submitted: 1/21/2009	
		Accepted: 01/21/2009	
Approval/Disapproval Date:		Execution Date:	<input type="text"/>
Awarded \$ Amount:	\$ <input type="text"/>	Related Docs:	<input type="text"/>
View Source Justification Form Download form as PDF		<input type="button" value="Browse"/> <input type="button" value="Upload"/>	
<input type="button" value="Update"/>		<input type="button" value="Cancel"/>	

Locate completed form on the computer and select open.



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Select “Upload”

The screenshot shows a web form titled "Review Information". It contains several input fields: "ID:" with the value "191", "PO#:" (empty), "Review End Date:" (empty), "Approval Status:" with "Submitted: 1/21/2009" and "Accepted: 01/21/2009", "Approval/Disapproval Date:" (empty), "Execution Date:" (empty), and "Awarded \$ Amount:" with a "\$" symbol and an empty field. Below these are links for "View Source Justification Form" and "Download form as PDF". On the right, there is a "Related Docs:" section with a text box showing "Files selected to upload: Procedures for processing Sole Sources for Materials1.doc" and "1 file(s) selected at 77.5KB". To the right of this box are "Browse" and "UPLOAD" buttons, with a progress bar below showing "UPLOADING 0%". At the bottom are "Update" and "Cancel" buttons. The "UPLOAD" button is highlighted with a red rectangle.

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

This screenshot shows the same "Review Information" form, but with ID "190". The "Attachments:" section on the left now lists "ITQ Aggregates 2006-2010 Sup 1 .doc" and "Agg#1 Flyer.doc". The "Related Docs:" section is empty. The "View Source Justification Form" and "Download form as PDF" links are still present. The "Update" button at the bottom is now highlighted with a red rectangle. A red arrow points from the "Update" button to the "View Source Justification Form" link.

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,
 - If approved the Associate Commodity Manager 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.
 - You do not need to route to the sole source coordinator to let them know you approved.

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If **disapproved**, the Commodity Specialist:

- Attaches their disapproved determination summary to the electronic request.
 - Do **Not** 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 **must** 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.

The screenshot shows a software window titled "Approval Routing". Inside the window, there is a "Routing Comments:" label above a large text area. To the right of this is a "Routing E-mail:" label above a text input field. Further right is a button labeled "Route for Review". At the bottom left of the window is an "Update" button, and at the bottom right is a "Cancel" button. A mouse cursor is pointing at the "Route for Review" button.

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