

## 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.

New Form  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.

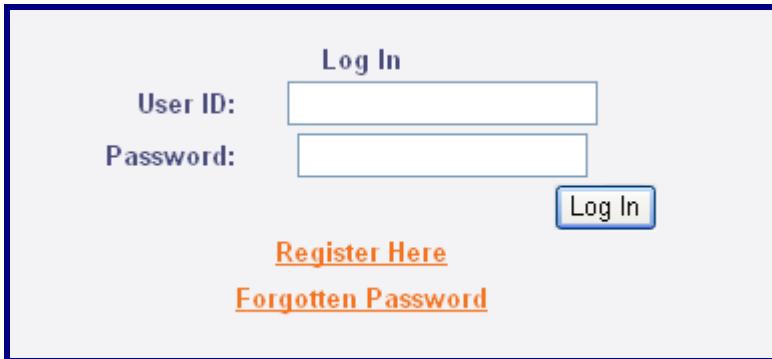
Your source justification for sue's test 01/23/09 has been accepted and is under review. Your ID# is 199.

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 Services

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



The image shows the eMarketplace Log In form. It features a 'Log In' button at the top right, followed by fields for 'User ID' and 'Password'. Below the password field is a 'Log In' button. At the bottom are links for 'Register Here' and 'Forgotten Password'.

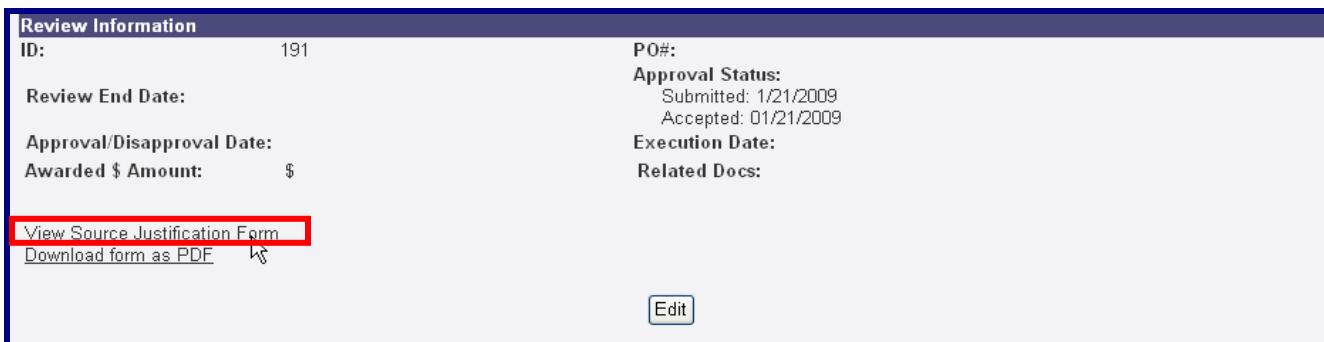
Once logged in, select the Sole Source Procurements link on eMarketplace.



Locate correct ID # and select the Details link.



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 image shows the Source Justification Form details. It includes fields for 'Review Information' (ID: 191, Review End Date, Approval/Disapproval Date, Awarded \$ Amount), 'PO#', 'Approval Status' (Submitted: 1/21/2009, Accepted: 01/21/2009), 'Execution Date', and 'Related Docs'. At the bottom are links for 'View Source Justification Form' (highlighted with a red box), 'Download form as PDF' (with a PDF icon), and 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.**

## Procedures for Processing Sole Source Documents for Services

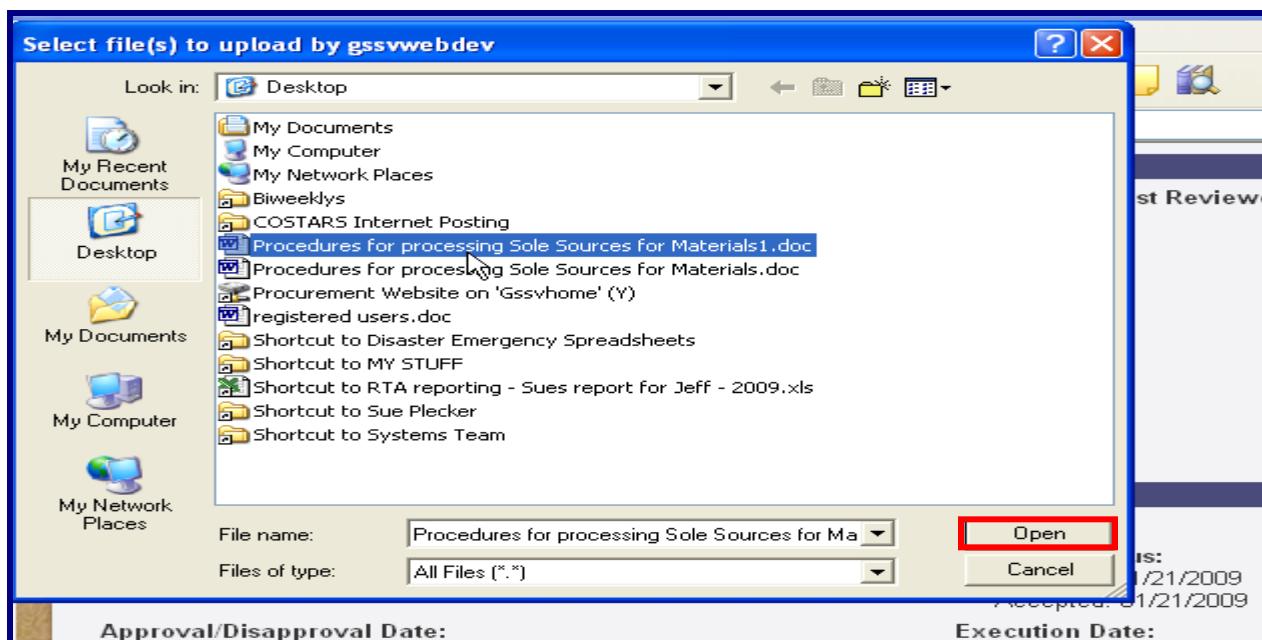
The Summary Sheet must be uploaded to the website. Start by selecting the “Edit” button.

Review Information	
ID:	191
Review End Date:	
Approval/Disapproval Date:	
Awarded \$ Amount:	\$
<a href="#">View Source Justification Form</a> <a href="#">Download form as PDF</a>	
<input style="border: 2px solid red; padding: 2px; width: 40px; height: 20px; border-radius: 5px; background-color: white; color: black; font-weight: bold; font-size: 10px; margin: 10px auto;" type="button" value="Edit"/>	

Select “Browse”

Review Information	
ID:	191
Review End Date:	<input type="text"/>
Approval/Disapproval Date:	
Awarded \$ Amount:	\$ <input type="text"/>
<a href="#">View Source Justification Form</a> <a href="#">Download form as PDF</a>	
<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; background-color: white; color: black; font-weight: bold; font-size: 10px; margin: 10px auto;" type="button" value="Update"/> <input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; background-color: white; color: black; font-weight: bold; font-size: 10px; margin: 10px auto;" type="button" value="Cancel"/>	
<input style="border: 2px solid red; padding: 2px; width: 40px; height: 20px; border-radius: 5px; background-color: white; color: black; font-weight: bold; font-size: 10px; margin: 10px auto;" type="button" value="Browse"/> <input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; background-color: white; color: black; font-weight: bold; font-size: 10px; margin: 10px auto;" type="button" value="UPLOAD"/>	

Locate completed form on the computer and select open.



## Procedures for Processing Sole Source Documents for Services

Select “Upload”

**Review Information**

ID:	191	PO#:	<input type="text"/>
Review End Date:	<input type="text"/>	Approval Status:	Submitted: 1/21/2009 Accepted: 01/21/2009
Approval/Disapproval Date:	<input type="text"/>	Execution Date:	<input type="text"/>
Awarded \$ Amount:	\$ <input type="text"/>	Related Docs:	
<a href="#">View Source Justification Form</a> <a href="#">Download form as PDF</a>		Files selected to upload: Procedures for processing Sole Sources for Materials1.doc 1 file(s) selected at 77.5KB	<input type="button" value="Browse"/> <input style="border: 2px solid red; border-radius: 5px; padding: 2px 10px; color: red; background-color: #fff; font-weight: bold; font-size: 10px; margin-left: 10px;" type="button" value="UPLOAD"/>
<input type="button" value="Update"/>		<input type="button" value="Cancel"/>	

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

**Review Information**

ID:	190	PO#:	<input type="text"/>
Review End Date:	<input type="text"/>	Approval Status:	Submitted: 1/21/2009 Accepted: 01/21/2009
Approval/Disapproval Date:	<input type="text"/>	Execution Date:	<input type="text"/>
Awarded \$ Amount:	\$ <input type="text"/>	Related Docs:	<input type="button" value="Browse"/> <input type="button" value="UPLOAD"/>
<a href="#">View Source Justification Form</a>  <a href="#">Download form as PDF</a>		<input type="text"/>	
<input style="border: 2px solid red; border-radius: 5px; padding: 2px 10px; color: red; background-color: #fff; font-weight: bold; font-size: 10px;" type="button" value="Update"/>		<input type="button" value="Cancel"/>	

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.

## **Procedures for Processing Sole Source Documents for Services**

**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 'Approval Routing' dialog box. At the top, it says 'Approval Routing'. Below that, there are two input fields: 'Routing Comments:' and 'Routing E-mail:'. Under 'Comments', there is a large text area with a vertical scroll bar. Under 'E-mail', there is a text input field with a small icon to its left. At the bottom of the dialog are three buttons: 'Update' (left), 'Cancel' (right), and 'Route for Review' (center, with a cursor arrow pointing to it).

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