REQUEST FOR SPECIAL PROCUREMENT

A PeopleSoft form; a paperless process, workflow-based approvals, and an audit trail for tracking.

How to complete and submit a Special Procurement request.

T A B L E   O F   C O N T E N T S

OVERVIEW

Qualifying Purchases

We all know there are standard rules to follow when we buy something or establish a contract on behalf of the State, but in rare circumstances, there may be needs that don't line up with the traditional requirements.

Special purchasing methods are allowed by Indiana Code, but the law is very specific about the criteria necessary under this provision. It takes research, documentation, and detailed justification to support a Special Procurement.

The instruction in this training covers entering a Request for Special Procurement form in PeopleSoft; it doesn't cover all the business requirements.

To make sure you know what's required, check out the Delegation of Purchasing Authority (DPAP) manual on IDOA's webpage https://www.in.gov/idoa/files/ProcTraining_DPAPManual.pdf or review the Indiana Code on the Indiana General Assembly website http://iga.in.gov/legislative/laws/2020/ic/titles/001 .

If you need advice or guidance, contact your IDOA Account Manager, one of the Sourcing analysts, or any of the IDOA Procurement Division directors for help.

MORE INFO

A Special Procurement is not the same thing as a Special Request requisition. Be sure you know the difference.

- A Special Request is a PeopleSoft term; it refers to a requisition with line items that aren't available in the eProcurement catalog.
- A Special Procurement refers to rules that allow special purchasing methods based on provisions under Indiana Code. It requires the Request for Special Procurement form in PeopleSoft and IDOA approval (over $5,000).
- A Special Procurement will always be entered as a Special Request requisition in PeopleSoft, but a Special Request requisition will infrequently represent a Special Procurement.

OVERVIEW

New Procedures

With the implementation of the new PS form there are significant new requirements.

$5, 000 OR MORE

ALL SPECIAL PROCUREMENT REQUESTS $5,000 OR MORE ARE TO BE ENTERED IN PEOPLESOFT USING THE REQUEST FOR SPECIAL PROCUREMENT FORM.

A PS REQUISITION NUMBER IS REQUIRED AND must be entered on the form in the Agency Details section. Purchases to result in $0 or revenue generating contracts are exceptions to this requirement.

LESS THAN $5,000

Under the Delegation of Purchasing Authority Program (DPAP) you may make qualifying purchases less than $5,000 according to Special Procurement rules without IDOA approval. That policy isn't changing, but there are some new procedures.

- All purchases made using special methods must be appropriately documented in the solicitation file, but a form will no longer be required. (Please refer to the DPAP manual for instruction concerning documentation requirements.)

- As required by statute, all solicitations done using special methods must be maintained in a separate file for Special Procurements only.

MORE INFO

The req must be entered and saved, but it doesn't have to be approved or budget checked before the request form is submitted.

OVERVIEW

Oversight Approvals
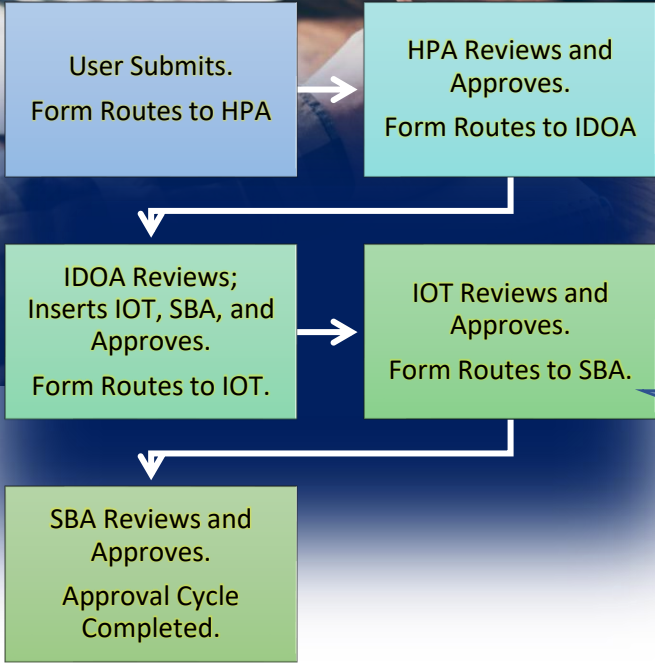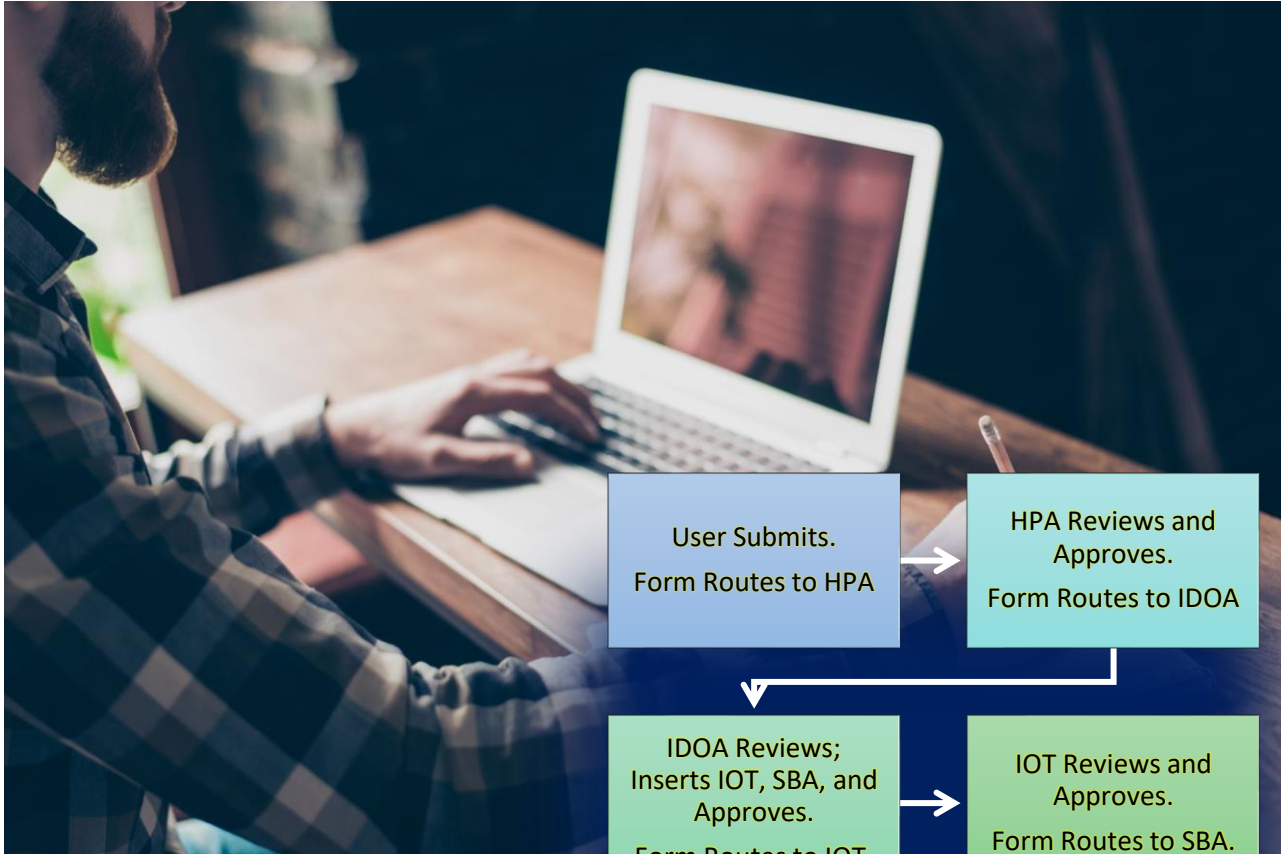
Here's how it works.

All PS Financials users with the basic ePro User role (which is everyone) have access to the Request for Special Procurement form.

After you complete and submit it, the form routes to your agency head procurement agent for approval.

> The submitter is the person who created the form and submits it into workflow
> If you're the HPA and the submitter, the request will self-approve.

After the HPA approval, it'll route to an IDOA Account Manager or Sourcing Analyst.

If the purchase value totals greater than $1,000,000, it'll route to the Director of Account Management, Director of Strategic Sourcing, or the IDOA Deputy Commissioner.

IDOA will review the request.

- If required, they'll insert IOT and SBA approvers.
- If no additional review is needed, IDOA's step will complete the cycle.

Once all required steps are complete, the submitter will receive an email notification that the request has been approved.

User Submits. Form Routes to HPA	HPA Reviews and Approves. Form Routes to IDOA
IDOA Reviews; Inserts IOT, SBA, and Approves. Form Routes to IOT.	IOT Reviews and Approves. Form Routes to SBA.
SBA Reviews and Approves. Approval Cycle Completed.	

MORE INFO

The head procurement agent security role is new and being used to designate a required approval step in workflow. It's extremely important to keep this information current. Notify your IDOA account manager or any Procurement Division director of any changes immediately.

A new head procurement agent must first be nominated by your agency head, then approved by IDOA. This applies even when someone in the role moves from one agency to another. Once the nomination is approved, IDOA will request the PS security role update on your agency's behalf.

OVERVIEW
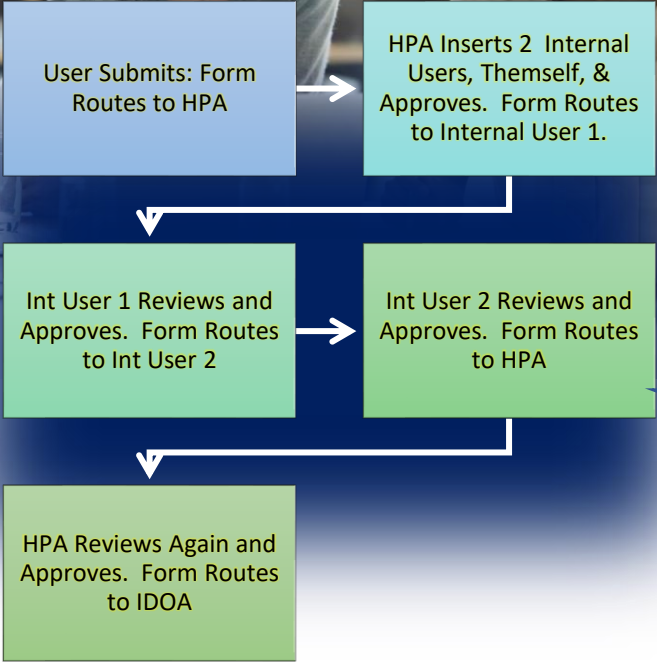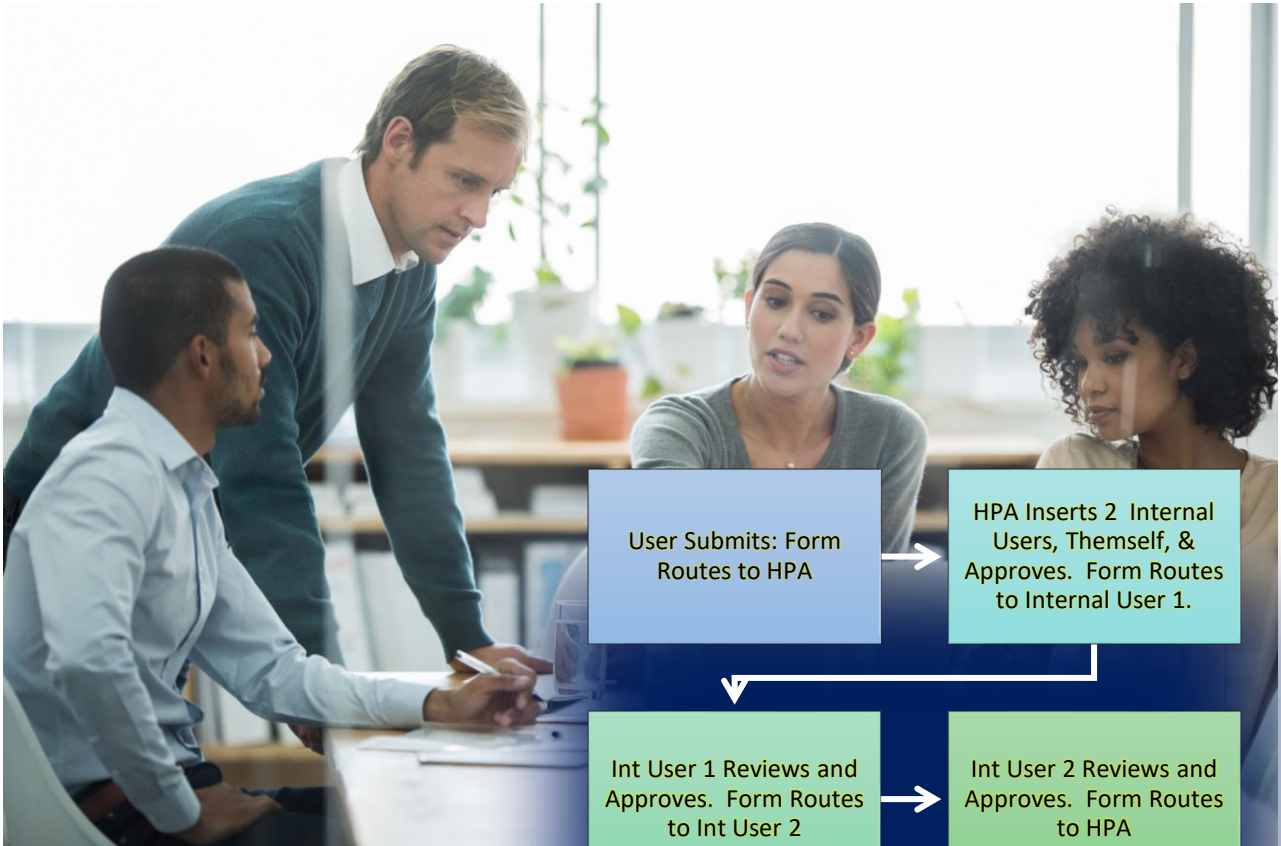
Internal Review

The workflow design for the SPR form is structured to meet the oversight-level requirements, and changes to the configuration to accommodate your agency's internal needs aren't allowed. If you follow the business rules, though, manually inserting others for internal review is a simple option.

The Request for Special Procurement must be submitted to IDOA by the agency head procurement agent.

If someone is inserted after the HPA, the HPA must also be inserted to be the approver prior to the IDOA step; Yes, that means the head procurement agent will have to approve the form twice.

We'll go over the PeopleSoft steps to insert an approver when we talk about submitting your form.

User Submits: Form Routes to HPA

HPA Inserts 2 Internal Users, Themself, & Approves. Form Routes to Internal User 1.

Int User 1 Reviews and Approves. Form Routes to Int User 2

Int User 2 Reviews and Approves. Form Routes to HPA

HPA Reviews Again and Approves. Form Routes to IDOA

MORE INFO

Be careful if you choose to insert approvers. If the form is submitted to IDOA by anyone other than your head procurement agent, the request will be denied, and you'll have to resubmit it.

GETTING STARTED
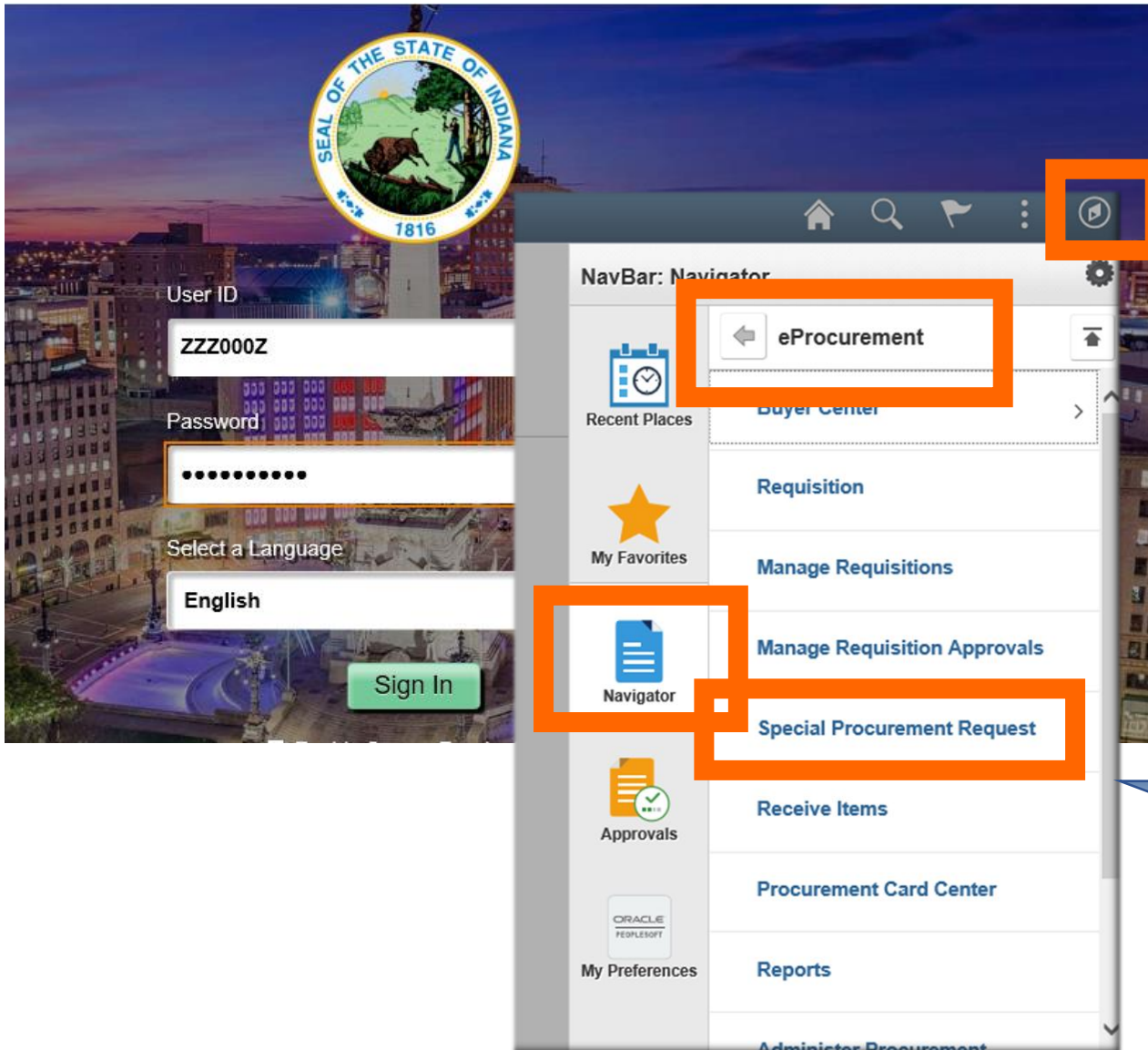
The Navigation

The Request for Special Procurement form is found in the PeopleSoft eProcurement menu selection. Here's how to get there.

After you log into Financials, open the NavBar.

- Click on the Navigator icon.

- Select **eProcurement** from the menu options.

- Click on **Special Procurement Request**.

MORE INFO

If you don't see the Special Procurement Request as an option in your menu, submit a ticket to GMIS. Be sure to include your User ID.

(Login screen)
SEAL OF THE STATE OF INDIANA
1816

User ID
ZZZ000Z

Password
••••••••••

Select a Language
English

Sign In

(NavBar: Navigator panel)
NavBar: Navigator

Recent Places

My Favorites

Navigator

Approvals

ORACLE PEOPLESOFT
My Preferences

eProcurement

Buyer Center

Requisition

Manage Requisitions

Manage Requisition Approvals

Special Procurement Request

Receive Items

Procurement Card Center

Reports

Administer Procurement

GETTING STARTED

Search/Fill a Form

‹ Employee Self Service   **Search/Fill a Form**

Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value | Add a New Value |

▼ Search Criteria

Sequence Number = [ ]

Subject begins with [ ]

Document Key String begins with [ ]

Priority = [ ] [ ]

Due Date = [ ] 📅

Approval Status = [ ] [ ]

☐ Case Sensitive

Search   Clear   Basic Search   📄 Save Search Criteria

Create or Search for a Form

Whether you want to create a new request or find an existing one, it all starts from the Search/Fill a Form page.

With the **Find an Existing Value** tab selected, use any of the criteria choices to search for an existing form.

If you don't enter search criteria and just hit the **Search** button, a list of all the forms you've entered will be returned. Using any of the search options will narrow your results and make it easier to find your form.

To start a new form, just select the **Add a New Value** tab and a blank form will open.

EXISTING FORMS ARE ACCESSIBLE ONLY TO THE PERSON WHO CREATED IT ORIGINALLY.
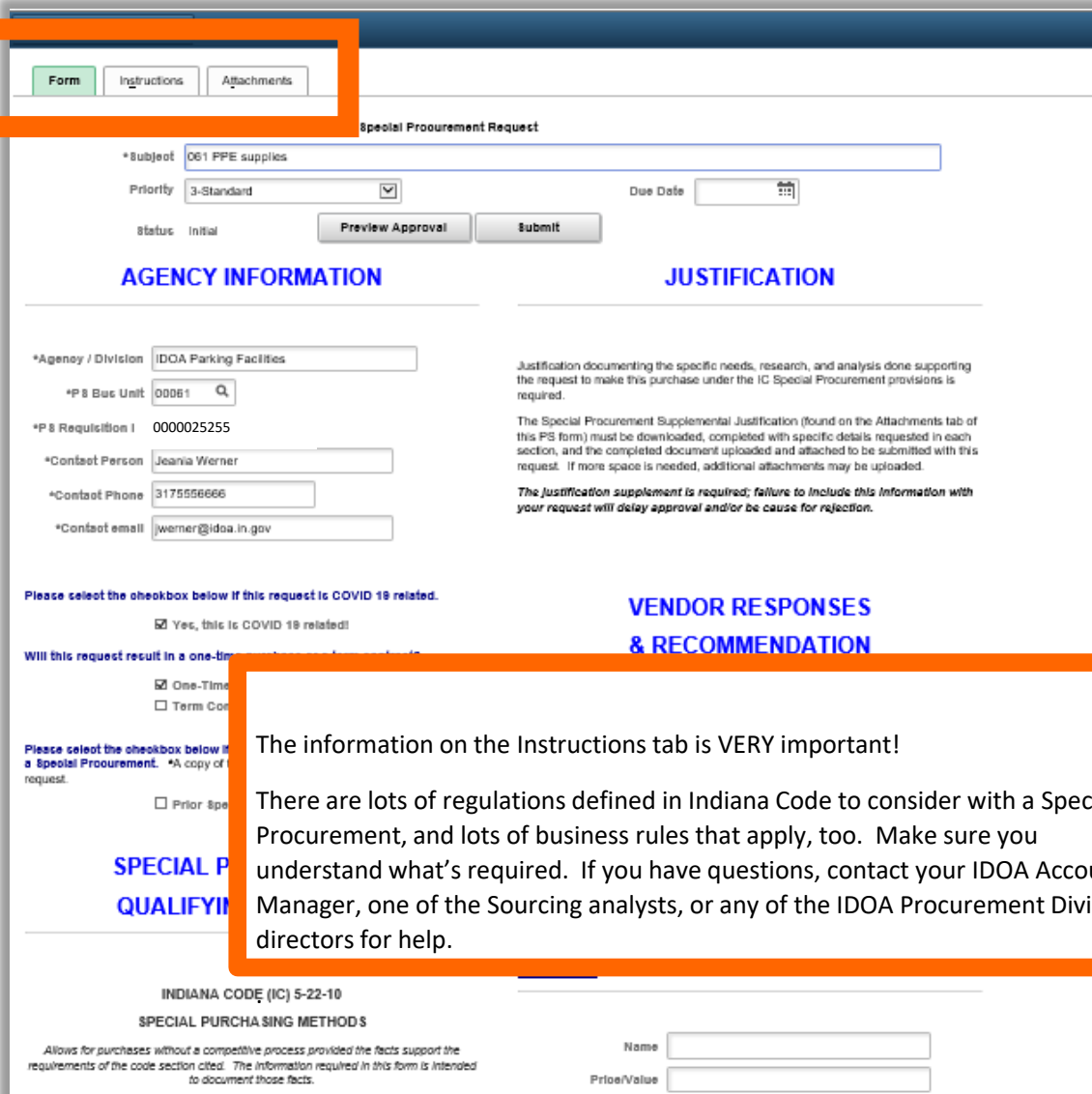
MORE INFO

As you're deciding what search criteria options might work best, don't forget that the operator choices in the drop-down menus offer even more flexibility. They can be helpful if you know what you're looking for but you're lacking specifics.

If you typically use the same criteria options and don't want to enter them each time you search, use the **Save Search Criteria** link at the bottom of the page (next to the Search and Clear buttons).

GETTING STARTED

The Form Structure

Before we start entering any information, understanding how the components of the form are organized will be helpful.

The tabs you see at the top divide the content into three sections.

- The **Form** tab is where all the information required is entered or selected.

- The **Instructions** tab explains a lot about what constitutes a Special Procurement as well as the rules and specifics defined by Indiana Code.

- The **Attachments** tab is where you'll find forms that you need to download, and where you'll attach additional justification or documents for the approvers to review.

Click on the tabs to move back and forth between the sections as needed.

MORE INFO

At first glance the form may look overwhelming, but it's not complicated.

The Forms Builder tool requires the form fields to be organized into one or two columns; This form uses two.

Read it as you might a newspaper. Start with Agency Information section and continue down the left column to the bottom of the page; then return to the top and follow down the right column that begins with the Justification section.

Form | Instructions | Attachments

Special Procurement Request

*Subject: 061 PPE supplies

Priority: 3-Standard   Due Date:

Status: Initial   [Preview Approval]   [Submit]

AGENCY INFORMATION

*Agency / Division: IDOA Parking Facilities
*PS Bus Unit: 00061
*PS Requisition I: 0000025255
*Contact Person: Jeania Werner
*Contact Phone: 3175556666
*Contact email: jwerner@idoa.in.gov

Please select the checkbox below if this request is COVID 19 related.
☑ Yes, this is COVID 19 related!

Will this request result in a one-time...
☑ One-Time
☐ Term Con

Please select the checkbox below i...
a Special Procurement. *A copy of...
request.
☐ Prior Spe

SPECIAL P
QUALIFYI

INDIANA CODE (IC) 5-22-10
SPECIAL PURCHASING METHODS

Allows for purchases without a competitive process provided the facts support the requirements of the code section cited. The information required in this form is intended to document those facts.

JUSTIFICATION

Justification documenting the specific needs, research, and analysis done supporting the request to make this purchase under the IC Special Procurement provisions is required.

The Special Procurement Supplemental Justification (found on the Attachments tab of this PS form) must be downloaded, completed with specific details requested in each section, and the completed document uploaded and attached to be submitted with this request. If more space is needed, additional attachments may be uploaded.

The justification supplement is required; failure to include this information with your request will delay approval and/or be cause for rejection.

VENDOR RESPONSES
& RECOMMENDATION

Name:
Price/Value:

The information on the Instructions tab is VERY important!

There are lots of regulations defined in Indiana Code to consider with a Special Procurement, and lots of business rules that apply, too. Make sure you understand what's required. If you have questions, contact your IDOA Account Manager, one of the Sourcing analysts, or any of the IDOA Procurement Division directors for help.

GETTING STARTED

General Basics

In the Subject field, enter the last three digits of your agency's Business Unit followed by a brief description of the goods or services to be purchased with this request.

The Priority and Due Date fields DO NOT trigger system actions or alert approvers that a request is considered a priority. You may use them for internal tracking if you'd like, but they offer no other benefit. You may also ignore them completely.

The Status field will display Initial when you start a new form and will update as your request is processed through workflow.

- **Pending Approval** means it's been submitted and is pending an approver's action.
- **Canceled** means it's been submitted, but the submission was canceled.
- **Approved** means workflow routing is complete and your request is approved.
- **Denied** means your request was submitted and denied by an approver.

<mark>This is important</mark>. A response is required in any field marked with an asterisk (*). If something doesn't apply to your request, enter N/A or Not Applicable; you won't be allowed to save your work if you leave it blank.

MORE INFO

As you complete the form, keep in mind that unlike pages in the PS application, a Form doesn't validate your response to make sure it's accurate or formatted correctly.

COMPLETE THE FORM

AGENCY INFORMATION

*Agency / Division	IDOA Parking Facilities
*PS Bus Unit	00061
*PS Requisition ID	0000025255
*Contact Person	Jeania Werner
*Contact Phone	3175556666
*Contact email	jwerner@idoa.in.gov

MORE INFO

Agency Information

Now. Let's get started on completing the form.

The **AGENCY INFORMATION** section asks for very basic info, and all the fields are required to be completed.

A requisition is required unless the approval of your request will result in a $0 contract, a revenue generating contract, or will be paid for using the P-Card.

In the PS Requisition ID field, enter
- **A valid requisition ID**, or
- **$0 Dollar** for a Zero-Dollar contract
- **Rev Gen** for a Revenue Generating contract, or
- **P-Card** if it will be paid for with a procurement card

If the req ID field isn't completed correctly based on the type of purchase to be made, your request may be returned. If there's a problem with being able to provide a req, for whatever reason, contact your IDOA Account Manager, one of the Sourcing analysts, or any of the IDOA Procurement Division directors to discuss the issue before you submit the form.

A valid Requisition ID must be entered, but the req isn't required to be Approved or have a Valid Budget Check status prior to submitting your request.

The PS Requisition ID will allow this request to be linked to other resulting PS Financials documents, like contracts, purchase orders, and payments for reporting and tracking purposes.

COMPLETE THE FORM

Special Procurement Qualifying Provision

< Employee Self Service

Search/Fill in a Form

Form | Instructions | Attachments

Special Procurement Request

*Subject | 061 PPE Supplies

SPECIAL PROCUREMENT QUALIFYING PROVISION

INDIANA CODE (IC) 5-22-10

SPECIAL PURCHASING METHODS

Allows for purchases without a competitive process provided the facts support the requirements of the code section cited. The information required in this form is intended to document those facts.

Review the IC on the Instructions Tab.

Select the appropriate IC provision for this request. (If citing 5-22-10-13, a le

*IC Provisions for Special Procurement

10-04 Emergency Conditions
10-05 Savings to Government
10-06 Auctions
10-07 Data Processing
10-08 Compatability
10-09 Agency Impairment
10-10 No Offer Received
10-11 Eval of Supplies
10-12 Government Discount
10-13 Single Source for Supply
10-14 GSA Price
10-15 Person with Fed Contract
10-16 Transfer from Fed Gov
10-17 Acq Supplies thru Gift
10-18 Copyrighted Materials
10-19 Pur from Public Utility
10-20 Pur of Petroleum Prdcts

In order to use a special purchasing method, a purchase must qualify under Indiana Code and the eligibility requirements defined in each section.

Before you prepare or submit a Special Procurement Request, be sure to study the code criteria carefully.

Documentation explaining how and why your needs meet the specifics of the provisions must be included with your request. This information may be uploaded on the Attachment tab.

On the form, select the **Indiana Code (IC) Provision for the Special Procurement** that applies to your purchase from the pop-up menu.

MORE INFO

There's a link on the Instructions tab to the Indiana General Assembly website where you'll find the entire code and provision details.

COMPLETE THE FORM

PURCHASE DETAILS

Describe the products/services to be purchased under this request.

*Purchase Description

Enter a description of the purchase you need to make here.

249 characters remaining

If this approval/award will result in a contract, provide a brief summary of the contract scope (including modifications represented in amendment/renewal).

Scope Summary

254

If there are state or federal laws requiring a certain course of action, please select the checkbox below.

☑ Yes, there are state or federal requirements!

If state/federal requirements exist, please cite and explain.

Requirements Cited

Explain the State or Federal requirements here.

250 characters remaining

Select the checkbox below if this purchase includes information technology products or services, will be hosted on the State IOT backbone, requires IOT support and/or implementation, or is a project of which IOT should be aware.

☐ Yes! IOT needs to see this!

Details About the Purchase

The Purchase Details section must provide the facts and specifics about the purchase to be made if your request is approved. Be sure to include:

- A description of the products or services needed,
- A summary of the contract scope if there's a contract,
- And any State or Federal Requirements (like use of a specific provider, or deadlines to assure funding).

Don't forget to select the checkboxes if there are State or federal requirements, or if IOT approval is needed.

MORE INFO

The text fields in this section accommodate only 254 characters, which may not be enough to provide all the necessary details.

If you need more space you may use the **More Information** field at the bottom of the page, or include a separate document on the Attachments tab.

COMPLETE THE FORM

Award Details: The Type

The Award Details section of the form must classify the purchase and explain how it will be managed if it's approved.

Read the descriptions of the **Award Types** carefully and select the one that applies to your purchase request from drop-down menu.

IDOA must be able to review the original contract and all amendments if you choose the **Existing Cntrct Extend or Mod** Award Type.

- If the original contract and any amendments aren't posted publicly, enter the contract number in the **Prior Contract ID** field **AND** include copies of them on the Attachments tab.

- If the original contract and any amendments are posted publicly, enter ITP, then the contract number in **the Prior Contract ID** field. If it's available on the Transparency Portal, there's no need to attach copies.

AWARD DETAILS

AWARD TYPE

From the list of options below, select the type of award that will result if this request is approved.

- A new contract or new PO for commodity/service not competitively procured.

- A term extension or scope modifica... original procurement or existing con...

- A new $0 contract with payment or ... other than the State.

- A new contract that generates reve...

that generates revenue for the State.

Existing Cntrct Extend or Mod
New Contract or PO
New Revenue Generating Cntrct
New $0 Contract

*Award Type   New Contract or PO

If Amendment (extend/modify existing contract) was chosen as the Award Type, enter the original contract number/ID.

Prior Contract ID

A copy of the prior contract and all amendments must be attached to this request!

MORE INFO

Here's an example.

If Amendment (extend/modify existing contract) was chosen as the Award Type, enter the original contract number/ID.

Prior Contract ID   ITP 0000000000000000000045512

A copy of the prior contract and all amendments must be attached to this request!

COMPLETE THE FORM

Award Details: Value and Term

PURCHASE VALUE

Enter the value of this purchase according to these guidelines.

- NEW CONTRACT OR 1-TIME PO: Expenditure or Remuneration Amount by Fiscal Year.

- AMENDMENT/EXTENSION: Expenditure or Remuneration Amount of Contract *by Fiscal Year* BEFORE Amendment or Renewal AND AFTER Amendment or Renewal.

- $0 CONTRACT: Value of Contract to Contractor by Fiscal Year.

- REVENUE GENERATING: Revenue Amount by Fiscal Year.

*Purchase Value	7500.0000
*Currency Code	USD

CONTRACT TERM

- If the approval/award will result in a new contract, enter the term including options to renew.

- If the approval/award will result in an amendment, enter the total term of the agreement; the original contract term plus renewals/amendments, plus options to renew.

*Contract Term	Orig term 1 yr + 3 renew = 4 yrs total

The value of a purchase doesn't necessarily mean cost; there could be no actual cost to the State, or we may even collect funds in the case of a Revenue Generating contract.

Based on the definitions given as guidelines, enter the Purchase Value.

- The **Currency Code** USD (United States Dollars) is required; its sole purpose is to assist in workflow routing,

If approval of your request will result in a contract, enter the Contract Term.

- If it'll result in a contract amendment, enter the term of the total agreement. That includes the original term plus all amendments and renewals, PLUS options to renew.

MORE INFO

The Contract Term field is marked with an asterisk (*) indicating that a response is required. If approval of your request will result in a 1-time purchase and won't include a contract, just enter N/A.

COMPLETE THE FORM

Justification

The Justification section of the form doesn't require a response but explains that documentation is required supporting the need for a special purchasing method and detailing how it qualifies under Indiana Code.

To assist in collecting this information with consistency, a separate document titled SPR Supplemental Justification has been created; it must be completed and included with each request submitted.

MORE INFO

Don't forget to include the required justification supplement document; if you do, it'll likely result in denial of your request initially, which will ultimately delay approval.

COMPLETE THE FORM

SPR Supplemental Justification Attachment

To access the SPR Supplemental Justification Attachment, select the **Attachments** tab.

The **Download Templates** section lists only one document currently; the Supplemental Justification file.

Click **Open** to access the fillable PDF supplemental document. After you download it, you can save it in your personal directories or share it with others to complete.

When it's completed, click the **Attach** button under the **Upload your attachments** section.

Click the **Browse...** button to select the completed document, then click the **Upload** button.

MORE INFO

Use the Attachments tab to upload all the information that must be provided with the request form; stuff like the Request for Quotation Package, a sole source letter from the supplier, contract clearance check results, etc., are all things to include here.

Use the Add a Row button ➕ to insert as many documents as you need.

COMPLETE THE FORM

Vendor Responses

VENDOR RESPONSES & RECOMMENDATION

Provide the names of all vendors contacted and prices quoted (or associated value) for each one.

VENDOR 1

*Name: ABC Enterprises

*Price/Value: 12,000.00

VENDOR 2

Name:

Price/Value:

Fewer than three vendors contacted?

If fewer than three quotes are included, please explain why.

Details explaining why only one vendor was solicited entered here.

188 characters remaining

VENDOR 3

Name:

Price/Value:

Three price quotes are required unless there's documentation to justify why that's not possible.

In the **Vendor Responses & Recommendation** section, enter the name of each vendor contacted and their quoted price.

If three vendors weren't contacted, complete the section that asks you to explain why.

Use the More Information field or include an attachment if there's not enough space for your response.

COMPLETE THE FORM

Your Award Recommendation

RECOMMENDED VENDOR INFORMATION

Based on your research and analysis, please tell us who you recommend as the vendor for award.

*Vendor Name ABC Enterprises

PeopleSoft Supplier ID 9900900099

*Vendor Address
123 South Blvd
Anytown IN 46000

223 characters remaining

Based on your evaluation of the responses, enter the name, address, and PeopleSoft Supplier ID of the vendor you recommend for award.

To make sure there are no delays, verify that the recommended vendor's PeopleSoft Supplier record is in Approved status and that Bidder Registration has been completed (if required).

FOR FUTURE USE (no response needed)

Future Use

Future 2

Future 3

MORE INFO

No responses are needed in the **FOR FUTURE USE** area.

COMPLETE THE FORM

Saving Your Work

As with any electronic document, you want to save it as soon as possible and frequently, so you don't lose your work. The form can be saved after the required fields (marked with an *asterisk) have been completed.

When you're ready, click the **Save** button at the bottom of the page.

Once saved, a number is assigned and displayed as the **Seq #** (Sequence Number) at the top of the page.

The Status will be Initial until the form is submitted for approval.

Remember to save anytime you make changes or updates. Once saved, you may navigate away from the form and come back to it anytime.

MORE INFO

Only you can access forms that you've saved, regardless of the status. If sharing the form with someone else is necessary, saving a PDF version or taking screenshots is the only option.

WORKFLOW

Preview Approvals & Submit the Request

When your form is complete and you're ready to submit it for approval, you have a couple of options.

If you'd like to see the workflow approval map to know which approvers will receive your request, click the **Preview Approval** button at the top of the Form tab.

After reviewing the workflow, you may click the **Submit** button from this page, or click the **OK** button to return to form.

You may click the **Submit** button on the form without previewing the approvals if you'd prefer.

The form Status will update from Initial to **Pending** after it's submitted for approval.

MORE INFO

Remember that IDOA will insert SBA and IOT if their review is required; don't be concerned if you don't see them listed on the workflow map when you submit a request.

| Form | Instructions | Attachments |

Special Procurement Request

Seq # 37

*Subject 061 SPR Example

Priority 3-Standard

Preview Approval   Submit

Status Initial

AGENCY INFORMATION

JUSTIFICATION

*Agency / Division IDOA / Procurement

*PS Bus Unit 00061

*PS Requisition ID 0000010101

*Contact Person Linda Sharp

*Contact Phone 317/555-0000

*Contact email SharpLi@ingc

Due Date

Justification documenting the specific needs, research, and analys

Special Procurement Request

Subject 061 SPR Example

Review/Edit Approvers

Special Procurement Request: 37:Initiated

1

Not Routed
David E Brittain - 00061
Head Procurement Agent

Not Routed
Werner,Jeania-061
IDOA Account Manager

OK   Submit

WORKFLOW

Tracking Approvals

You may track the approval of your request at any time after it's been submitted.

- Navigate to the Special Procurement Request under the eProcurement menu options and select the **Find an Existing Value** Tab.
- Use the search page options to find and open your form.

From the Form tab, click the [Approver Status] button.

> If you don't see the Approver Status button, check to be sure that the status of your form is **Pending**.

The workflow map will show you the approval steps, the name of the approver, and the step that is currently Pending. Click the OK button to return to the form.
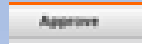
MORE INFO

If IDOA has inserted other approvers, you may see additional steps not included when you originally submitted the form.

New Window | Help

| Form | Instructions | Attachments |

Seq #   37

Special Procurement Request

*Subject   061 SPR Example

Priority   3-Standard

Status   Pending   [Approver Status]   [Cancel Approval]

AGENCY INFORMATION   **JUSTIFICATION**

*Agency / Division   IDOA / Procurement

Special Procurement Request

Subject   061 SPR Example

Review/Edit Approvers

Special Procurement Request: 37:Pending   Start New Path

1

Pending	Not Routed	Not Routed	Not Routed
David E Brittain - 00061	Carr,Todd-061	David E Brittain - 00061	Werner,Jeania-061
Head Procurement Agent	Inserted Approver	Inserted Approver	IDOA Account Manager

[OK]

WORKFLOW

Inserting Approvers

If you wish to have others in your agency review the form before it's submitted to IDOA, you may insert them into the predefined workflow. Here are some rules to follow.

- Only an approver can insert approvers. Anyone may complete the form, but only the head procurement agent can insert the first additional approver.

- If more than one internal approver is needed, additional approvers may be inserted by an inserted approver.

- Your head procurement agent must ALWAYS be the approver that submits the form to IDOA. If approvers have been inserted, the HPA must ALSO be inserted as the final agency approver. That means the HPA will be an approver twice.

1 Click the [green plus sign icon] green plus sign icon to insert an approver between those listed.

2 Search for or enter the person's user ID in the pop-up window and click the [button] button.

3 Enter a comment if needed and click the [Approve] button.

MORE INFO

To make sure that the agency head procurement agent is the last approver before the request routes to IDOA, in this example, the head procurement agent inserted one additional approver and then themself.

WORKFLOW

Cancel Approvals In Process

It's bound to happen; you submit a form for approval, then realize you forgot something or need to make a change. No problem. It's simple; even if an approver has already acted.

- Navigate to the Special Procurement Request under the eProcurement menu options and select the **Find an Existing Value** Tab.
- Use the search page options to find and open your form.

Click the [Approver Status] button if you'd like to see which approval step is pending.

If you want to take back control of the form to make changes, add information, or end the process for any reason, click the [Cancel Approval] button. The form's Status will update to **Cancelled**.

Click the [Approver Status] button and you'll see that the workflow step previously pending has been terminated.

Click the [Submit] button if you want to resubmit the revised form for approval.

MORE INFO

If you don't see the Approval Status button, make sure the form Status is Pending.

Search/Fill a Form

Employee Self Service

| Form | Instructions | Attachments |

Seq # 38

Special Procurement Request

*Subject 061 Brief summary describing this request entered here

Status Pending

[Approver Status] [Cancel Approval]

Search/Fill in a Form

Employee Self Service

| Form | Instructions | Attachments |

Seq # 38

Special Procurement Request

*Subject 061 Brief summary describing this request entered here

Status Cancelled

[Preview Approval] [Submit] [Approver Status]

Employee Self Service

Special Procurement Request

Subject 061 Brief summary describing this request entered here

Review/Edit Approvers

Special Procurement Request: 38:Terminated   View/Hide Comments

1

Approved	Terminated
David E Brittain - 00061	Werner,Jeania-061
Head Procurement Agent	
10/13/20 - 12:50 PM	10/13/20 - 12:58 PM

Comments

WORKFLOW

Your Request is Approved

1 If your request is approved, the submitter will receive an email notification. Only one important step left to complete!

POs and contracts that result from an approved Special Procurement must include a copy of the form and a copy of the page showing the dates and times of the approvals and all comments entered by the approvers.

- Navigate to the Special Procurement Request under the eProcurement menu options and select the **Find an Existing Value** Tab.
- Use the search page options to open your form.

Save a pdf copy or screen print of the entire Form.

2
- At the top of the Form tab, click the [Approver Status] button.

3 Below the workflow approval map, open the Comments section. (Click the Expand/Collapse button [► Comments] to open or close the section.)

Save a pdf copy or screenshot of the window showing the approvers, the dates and times of the approvals, and all the comments

WORKFLOW

Save a Copy of the Approved Form

If your approved Special Procurement will result in a contract, a copy of your approved form must be uploaded as an attachment in Supplier Contract Management (SCM).

Print to PDF

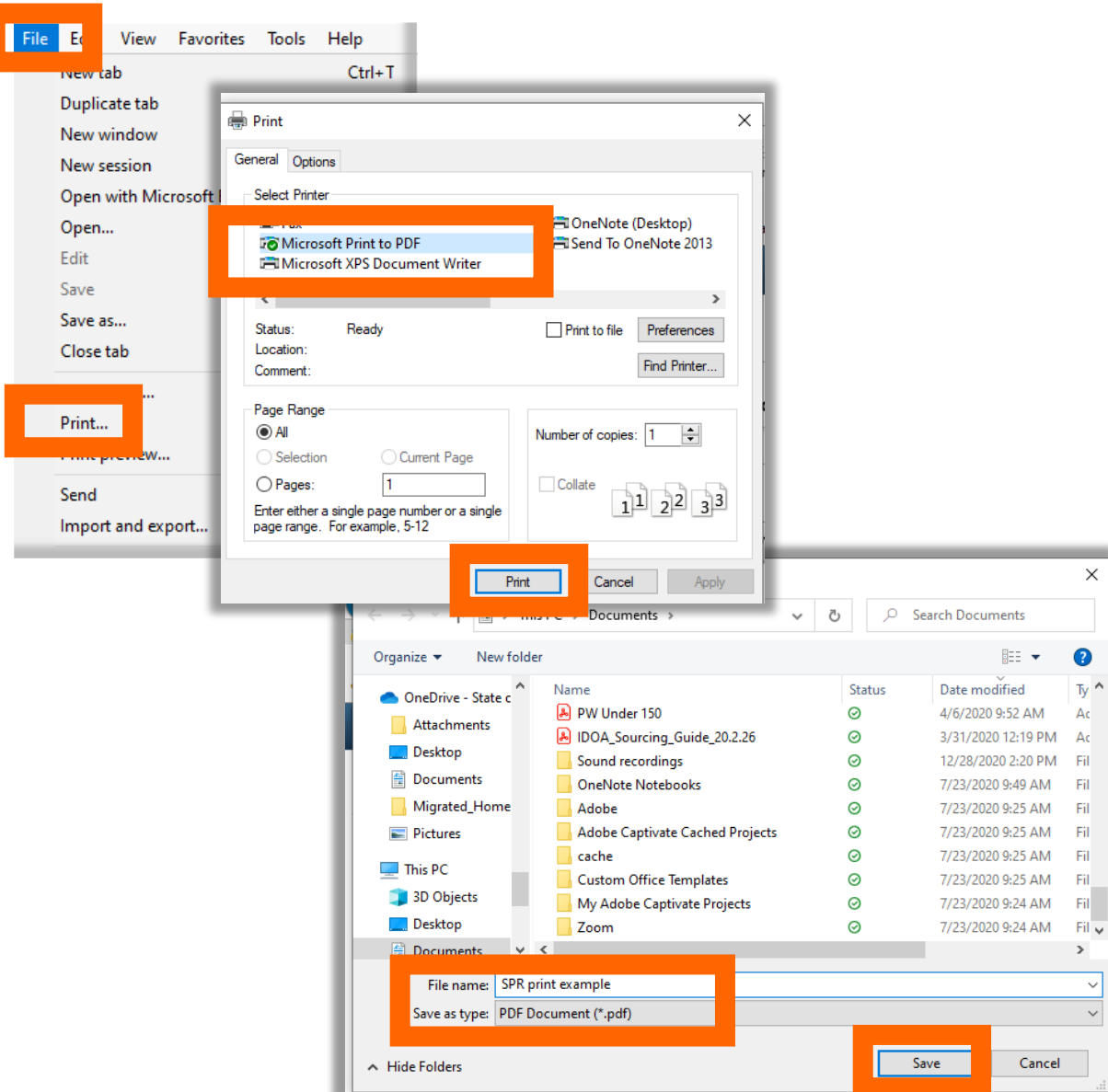- From the menu bar, click **File**, then select **Print...**

- Under the Printer options, select **Microsoft Print to PDF** and click the **Print** button.

  A pop up window will require you to designate where the file is to be saved in your directory.

- Give the file a name and click the **Save** button.

A PDF version of the form will be saved and may be accessed from the designated file directory location.

WORKFLOW

Your Request is Denied

1 If an approver denies your request, the submitter will receive an email notification.

Depending on the reason it was returned, you may want to make changes and resubmit it. First, though, let's find out why the approver sent it back.

- Navigate to the Special Procurement Request under the eProcurement menu options and select the **Find an Existing Value** Tab.
- Use the search page options to open your form.

2 • At the top of the Form tab, click the [Approver Status] button.

3 Below the workflow approval map, check out what the approver had to say in **Comments**. (Click the Expand/Collapse button [Comments] to open or close the section.)
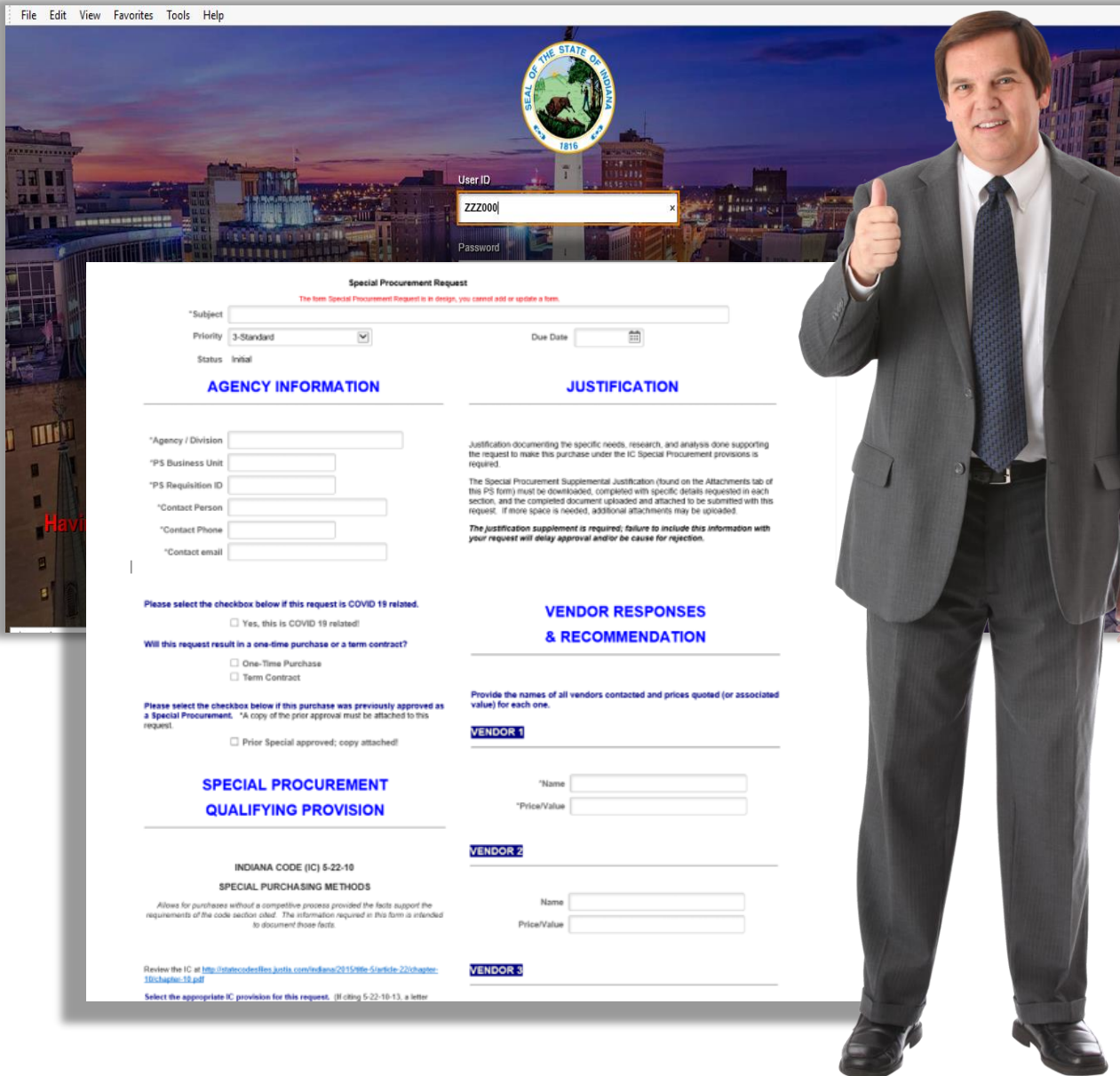
If you have questions about comments explaining why the request was denied, you can contact the approver directly by phone or email to discuss the details.

MORE INFO

You can update any of the fields or information on a request that's been denied, but the form status will remain Denied unless it's resubmitted. If you submit it, the status will update to Pending.

FS92DEV - [Form Approval] Form 37 (IDOA_SPR) has been Denied

gmisworkflow@iot.in.gov
To Carr, Todd
Mon 10/12/2020 5:...

Form 37 (IDOA_SPR) has been denied. Details are shown below:

Subject: 061 SPR Example
Priority: 3
Due Date:
Requester: L004300

Click on the URL to access the form: https://de...
Page=FORM&Action=U&SEQ_NBR=37

(This message was automatically generated by...

< Employee Self Service   Search/Fill in a Form

Form | Instructions | Attachments

Seq # 37   **Special Procurement Request**

*Subject 061 SPR Example

Priority 3-Standard

Status Denied   [Preview Approval] [Submit]   [Approver Status]

AGENCY INFORMATION   JUSTIFICATION

*Agency / Division IDOA / Procurement

*PS Bus Unit 00061

Justification documenting the specific needs, research, and analysis done supporting the request to make this purchase under the IC Special Procurement provisions is required.

The Special Procurement Supplemental Justification (found on the Attachments tab of...requested in each...submitted with this...uploaded.

Special Procurement Request

Subject   061 SPR Example

Review/Edit Approvers

Special Procurement Request: 37:Denied   View/Hide Comments

1

Denied
David E Brittain - 00061
Head Procurement Agent   →   **Terminated**
Werner,Jeania-061
IDOA Account Manager

Comments

...1 at 10/12/20 - 5:19 PM
Details explaining why this request is being denied and returned are entered here.

Comment History

[OK]

THE WRAP UP

Resources

We hope you feel confident with what you've learned about the requirements to request approval for a Special Procurement and the PeopleSoft form.

Remember that information and instruction concerning the business procedures and policies are available on our website https://www.in.gov/idoa/2865.htm in the Delegation of Purchasing Authority (DPAP) Manual.

You can also review the Indiana Code governing Special Procurements on the Indiana General Assembly website http://iga.in.gov/legislative/laws/2020/ic/titles/001 .

If you need advice or guidance, contact your IDOA Account Manager, one of the Sourcing analysts, or any of the IDOA Procurement Division directors for help.

Please submit a GMIS ticket to report any problems or issues with the PeopleSoft form.