Purchasing & Contracts

Standard Operating Procedures (SOP)

January 15, 2026

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Purchasing Request Form Summary

This form is for the purchase of goods/services & contractual agreements.

Purpose of the Purchasing Request Form

The Purchasing Request Form has been developed to align with the Indiana Department of Administration guidelines, including recent changes driven by Senate Bill 5, which emphasizes state contract accountability and fiscal efficiency. The form also establishes a streamlined and consistent process to help programs navigate applicable procurement methods, enabling smarter, more efficient purchasing, while maintaining compliance with state requirements.

Senate Bill 5 Summary

Senate Bill 5 (SB 5) strengthens transparency, oversight, and accountability in state contracting and procurement practices. The bill limits the use of noncompetitive and nonpublic contracts and reinforces competitive procurement as the standard approach for state agencies.

Key changes affecting special procurement requests include stricter limitations on sole-source and no-bid contracts, allowing exceptions only under clearly defined circumstances such as emergencies or statutory exemptions. Agencies must publicly post Requests for Proposals (RFPs) or Requests for Quotations (RFQs) in advance of contract awards, increasing visibility and competition. SB 5 also expands reporting and oversight requirements for higher-value contracts and significant amendments, including extensions and cost increases. Certain contracts and amendments must be reported to or reviewed by the appropriate budget or oversight committees before execution.

Overall, SB 5 reduces flexibility for special procurement requests, increases documentation and public disclosure requirements, and reinforces accountability in state purchasing decisions.

Determining if this is a Sub-Recipient or Vendor

Sub-Recipient

A subaward is for the purpose of carrying out a portion of a Federal award and creates a Federal assistance relationship between the recipient and the sub-recipient. ***A procurement method is not needed, proceed with RFC process (pg. 19).***

Sub-recipients may have one or more of the following characteristics:

- Does the entity determine who is eligible to participate in the federal program?
- Are the scope of work/terms and conditions of the agreement the same for the entity as they are for the recipient of the federal funds?
- Is the entity carrying out completion of the goal of the grant as stated in the federal award?
- Does the entity have the ability to make decisions about how services will be delivered to participants?
- Is the entity responsible for adherence to applicable federal program requirements outlined in the federal award?
- Does the entity demonstrate a financial or public need for funding to carry out a project or provide a service?
- Will the entity be reimbursed for only actual costs incurred?

Contractor

A contract is for the purpose of obtaining goods and services for the recipient's own use and creates a procurement relationship between the recipient and the contractor. ***A procurement method might be needed, check the next page.***

- A contract is required for any services over $2,500 OR 90 days.

A contractor relationship may have one or more of the following characteristics:

- **Does the entity provide the goods/services within normal business hours?**
- **Does the entity provide the same goods/services to other organizations?**
- **Was the entity's proposed price a factor in the selection process?**
- **Will the entity derive a profit from the agreement?**
- **Does the entity provide goods/services for the recipients' own use?**

Purchasing Agreements

The Indiana Department of Administration (IDOA) has agreements in place that all state agencies can use. According to Indiana Code, you must check the below vendors, in their respective order, Indiana Correctional Industries, Ability Indiana, and Quantity Purchasing Agreements to see if they have the goods/services you are requesting to purchase. If you have any questions, please reach out to Alex Stultz (AStultz@health.in.gov).

Indiana Correctional Industries (ICI)

The Indiana Correctional Industries offers a variety of quality supplies and services to State and local government while equipping offenders for reentry through career development. The Indiana Correctional Industries (ICI) full catalog is available for viewing online below.

- **ICI Website:** https://www.in.gov/idoc/indianacorrectionalindustries/
    - Go to the Products & Services section to see what goods/services they offer

Ability Indiana (AI)

The Ability Indiana work centers provide guaranteed supplies and services to State and local government while benefiting persons with disabilities.

- **AI Website:** https://www.abilityin.org/
    - Go to catalog to see vendors & what they offer

Quantity Purchasing Agreements (QPA)

A Quantity Purchasing Agreement is a contract for repetitively purchased supplies or services. These are established by IDOA and are a result from a competitive solicitation process. This includes punch-out requests like ODP, Grainger, Staples, etc.

- **List of QPA's here:** IDOA: Procurement: All Current QPAs

Creating a PO for These:

To make a purchase through a vendor on one of these websites, please send the quote & funding information to Purchasing@health.in.gov.

- If it is a punch-out request with no quote, please provide item #'s when submitting.
- For non-office supply Amazon items, work with Kelly Ezell to use the p-card.

***If the requested goods/services are not offered by one of the above, continue to the next page to see if a procurement method is required.**

Is A Procurement Method Needed?

The below can help you decide whether your purchase will require a procurement method or not based on what you are buying and the estimated amount of your request. It also lists what steps you will need to take to initiate that purchase.

Supplies/Goods: $0.01-$4,999

- No procurement method is needed.
- Email quote and funding info (including supplier ID) to Purchasing@health.in.gov, cc Alex Stultz.
    - Exception: IDOH Labs submit SharePoint entry.

Services: $0.01-$2,499

- No procurement method is needed.
- Email quote and funding info (including supplier ID) to Purchasing@health.in.gov, cc Alex Stultz.
    - Exception: IDOH Labs submit SharePoint entry.

Services: $2,500.-$4,999

- A procurement method **IS** needed.
- Submit Purchasing Request Form for 'Services: $2,500-$74,999' to initiate the procurement process.

Supplies/Goods OR Services: $5,000.00 & Over

- A procurement method **IS** needed.
- Submit Purchasing Request Form for the amount you are requesting to initiate the procurement process.

***IDOA requires procurement methods for $0.00 contracts, so a Purchasing Request Form will need to be submitted. They are not required for revenue agreements.**

Completing the Purchasing Request Form

Incomplete/Incorrect information on the form will cause a delay in the process and possibly lead to a request for resubmission

Form Section: Overview

This section is gathering information on the department/individual submitting the request.

Requestor Name: The individual working on the purchase request.
Department: The name of the Department requesting the purchase.
Does this request involve IT or data? This will help the Triage team bring in the necessary team to work together to make a decision best aligned for this request.
Is this request related to the Rural Health Transformation initiatives (using RHTP federal funding)? If the request is using the grant funding related to the RHT program, or to help any of the initiatives for this program, you will select 'Yes'. If it is not, please select 'No'.
Is this a high priority request? This is where you can let the Triage team know if this is a high priority request or not. Please note, this should only be checked 'Yes' in emergencies.
Please provide justification of why this is a high priority request. If it is high priority, a box will then pop up where you can state why it is immediate and what would happen if not handled immediately.

Form Section: Request Details

This section is gathering information to give the Triage team a better idea of how to proceed

What type of Request is this? This is where you will select the type of purchase you are requesting.

- If renewing a current agreement, please select 'New purchase request'.

What is the timeline for these goods/services? This is the timeframe of the good/service you are wanting to purchase.

- If this is a service that is needed repeatedly every year, please select 'More than 1 year' so the Triage team can find the best way to move forward with a multi-year agreement.

What is the estimated amount of this request? This is the estimated amount of the goods/services being requested.

- If your request is under $75,000.00 and it is for both goods & services, please proceed with either 'Services: $2,499 & Under' or 'Services: $2,500-$74,999'.

Form Section: Vendor Information – Purchases $4,999 & Under

Purchases $4,999 and under do not require a procurement method, so this section will gather the vendor information of who you are wanting to purchase the goods/services from.

- If you do not have a vendor selected, please contact AStultz@health.in.gov and we will work to find a vendor.

Form Section: Vendor Information

This section gathers what the Triage team will need to know about who we can purchase the goods/service from.

Is this good/service only provided by ONE vendor based on compatibility? This question is asking if the goods/services being requested are only available through one vendor based on compatibility.

- **Selecting 'Yes' even though other vendors can provide the good/service will lead to a resubmission request from the Triage team.**
- **If selected 'Yes', the following boxes will then pop up for you to complete: Vendor Name, Tax ID #, and please explain what happens if we do not go with this vendor.**

Vendor Name/Tax ID #/Email Address: This information will be necessary if the route of an RFQ is chosen. Please provide the full name of the vendor. If they also have an acronym, that can be included in parenthesis after the full name. The Tax ID # is provided by the vendor & is necessary to have when finding the correct bidder ID/supplier ID #'s. It is also needed to run clearance checks. An email address for a

vendor contact should also be listed. **Not including all 3 things will result in a resubmission request from the Triage team.**

- For help with finding vendor information, please feel free to reach out to AStultz@health.in.gov.
- One vendor must be Minority Owned/Women Owned/Veteran Owned, you can find registered vendors at the Excel on this link: https://www.in.gov/idoa/mwbe/minority-and-womens-business-enterprises/certified-business-search/

Form Section: Background Information

This section will collect information if there has previously been an agreement for these goods/services. This will give the Triage team an idea of how this has been previously done. If these are new goods/services, please continue past this section.

Current Contract Number: This is the SCM # for the agreement. If there is not one, please leave blank.
Current Contract Expiration Date: This is the current date the contract is set to expire on. If there is not a current contract, please leave blank.
Was this originally chosen via special procurement request?

Form Section: Funding Information

This section will gather the funding information so that the Procurement team has this information ready to create a requisition. For any questions on funding information, please reach out to your financial analyst or accountant. If you are not sure who that is, please reach out to AStultz@health.in.gov for that information.

Fund: This is what fund the money will pull from.
Program Code: This is based on what program is requesting the purchase.
Department Code: This is based on what department is requesting the purchase.
Project Code/Activity Code: If using federal funds, a project and activity code will be needed!

Form Section: CAI Change Order

This section is for areas who already have a work order with CAI and are needing to request changes.

Is the scope changing/additional deliverables being added? If there are any changes to the current scope outlined on the work order between IDOH/IDOA/CAI/Vendor, please select 'Yes'. If not, select 'No'.

Additional Amount Needed: This is the amount that is needing added.

Current PO #: This is the current purchase order being used to pay CAI for the project.

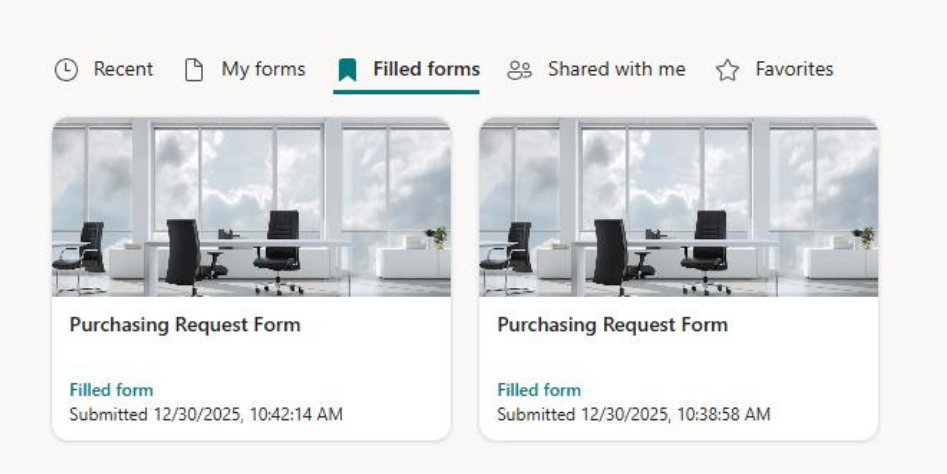
Form Section: Attachments/Additional Information

This section is where you can include any additional information, attachments, etc. for the IDOH Triage team to review to help with their decision making. You also will need to attach a Scope of Work to this section that outlines the goods/services being provided. *(For help on Scopes of Work, please reach out to the Legal or Contracts team).*

Submitting the Form

Once the form is complete, click the Submit button. You will then be prompted with a 'Thank You' message, which means your request has been submitted for review.

- **Under the message there is an option to save your response! This will save in your Microsoft Forms page under 'Filled forms'.**
    - If it doesn't, please feel free to reach out to AStultz@health.in.gov for a copy.



After Form Submission

The IDOH Triage team will meet to review the submitted form & discuss best next steps. They will email the requestor if more information is needed or if any questions arise. Once decided, an email will be sent to the requester with advice on next steps.

***No steps will be taken without acknowledgement from the program area first!**

Internal Triage meetings are every Tuesday at noon. **Please submit by close of business Monday to have your request reviewed in that week's meeting.**

- *Requests submitted after will roll to the following week.*

Types of Procurement Methods

National Co-Op Agreements

What are they?

National Cooperative Agreements are national organizations that house a wide variety of contracts that the State can take advantage of to leverage better pricing. Currently, the State of Indiana can work with:

MMCAP

The Minnesota Multistate Contracting Alliance for Pharmacy (MMCAP) has vendors that can provide a multitude of goods/services surrounding pharmacy/healthcare. Below is the link to the IDOA webpage with more information on what MMCAP is, as well as a link directly to the list of vendors that we are able to use.

- **IDOA Link:** IDOA: Procurement: MMCAP Contracts
- **MMCAP Link:** Contract List of Current Vendors by Goods and Services / Minnesota.gov

NASPO

The National Association of State Procurement Officials (NASPO) has a multitude of different types of goods/services they provide. At the link below you can break it down by vendor or by the type of goods/service you are looking for.

- **NASPO:** Cooperative contracts and public procurement| NASPO ValuePoint

GSA

The General Services Administration (GSA) website offers commercial goods/services, as well. You can use the below link to search products/services that you are looking for.

- **GSA:** Welcome to GSA Advantage!

What is the process?

This is an option the Triage team will look into once your purchasing request is submitted.

- If you know ahead of time that your good/service can be provided by a Co-Op agreement, a purchasing request form must be filled out & submitted to the Triage team with a note in the 'Additional Information' form.
    - If the request is through MMCAP – we can take it straight to a PO.
    - If the request is through NASPO – The triage team will double check that Indiana has a Participating Addendum with that vendor. If they do, a PO can be set up. If

not, a letter of intent must be submitted to IDOA so they can form an agreement to be included in the contract between NASPO and the selected vendor.
- If the request is through GSA- The triage team will submit a letter of intent to IDOA to start work on a contract, so we are able to leverage the pricing/agreement that GSA has in place. A PO will then be created.

Request for Quote

What are they?

A Request for Quote (RFQ) is a bid process that is done for purchases estimated under $75,000.00. These processes can be done by the state agency's procurement team.

What is the process?

1. The procurement team creates a requisition which is routed for approval through accounting, purchasing, and the department.
2. Once approved, the team creates an event and solicitation package.
3. The Event Details & Solicitation Package are sent out to the 4 vendors. They are also sent to the IDOA team so the bid can be posted on the website.
4. After 30 days, the procurement team gathers the responses and creates a Solicitation Summary. This document will list out the bids from each vendor and award percentages for any diversity subcontractor or preferences claimed.
5. The summary and all responses are sent to the program team with a suggested vendor to award (based on estimated price, subcontractor %, and preference %).
6. The program reviews the documents/proposals and selects the vendor they would like to move forward with.
    a. If the vendor put forward by the procurement team is not selected, a justification will need to be provided.
7. The program area will email the procurement team the vendor they would like to award.
8. The procurement team will fill out RFC form & reach out to program area if they have any questions.
    a. If a budget was not received with the bid packet, procurement will reach out to vendor for a detailed breakdown for a budget.
9. Once the RFC and budget are ready, the procurement team will award the event in PeopleSoft.
    a. If it is a good/supply that is a one-time purchase, the procurement team will take the REQ straight to PO.
    b. If it is a service, the procurement team will then send all documents and information over to the contracts team for processing.

Request for Proposal

What are they?

A Request for Proposal (RFP) is a bid process that is done for purchases estimated to be $75,000 or more. This is above the delegation of the agency and must be run by the Department of Administration agents. These are great for long-term agreements and take into account what is the 'Best Value' for the state based on a multitude of criteria.

What is the process?

1. Finance fills out an LOI and submits to IDOA.
2. IDOA emails the program/finance team to initiate the process by comprising a team of evaluators and advisors.
    a. Evaluators: Responsible for reviewing/evaluating/scoring proposals, attending presentations (if necessary), participating in discussions during scoring meetings, and helping to make final recommendations.
        i. There can be 3-5 evaluators. If requesting to use more, it will require IDOA approval.
    b. Advisors: Responsible for reviewing proposals, advising/assisting the evaluators and attending presentations (if necessary).
3. IDOA provides the agency with an RFP template to complete the technical and business proposals.
4. IDOA, with agency input, develops scoring methodology and cost proposal.
5. The RFP is released on the website, in the newspaper, and via targeted emails.
6. Respondents return proposals to IDOA by the due date.
7. IDOA distributes responses to the team.
8. Team determines if any clarifications are needed (First round of scoring completed by team).
9. IDOA sends clarifications to the respondents.
10. Vendors return the clarification responses to IDOA.
11. Determine whether "short listing" is appropriate.
12. IDOA schedules Vendor Presentations for respondents to present to the team.
13. Evaluators and advisors attend the presentation then meet to discuss. At the meeting, the team also sets a date for everyone to submit final scorecards to IDOA.
14. IDOA scores the responses.
    a. Scores cost/evaluates preferences and cost proposals
    b. Requests best and final offer then recalculates the scorecards
    c. IDOA verifies all scorecards

15. IDOA creates a Preliminary Award Letter & sends it to IDOH to start the contract process.
    a. Final Award Recommendation Letter is not sent to IDOH until after the vendor has signed the agreement and protest period has ended. This is in case a vendor has any issues with terms/conditions and we need to look at switching to second best vendor.
16. IDOH program puts together RFC packet, sends thru approvals, and then sends to RFC@health.in.gov & contract process starts.

Request for Information

What are they?

A Request for Information (RFI) is used by agencies to gain information on specifications and pricing for new products, programs or services. An agency may choose to proceed with an RFI to research information on a proposed RFP without having to commit to doing one. This does not result in awarding a vendor. An RFP would still need to be done once concluding with this process.

What is the process?

1. Finance submits LOI to IDOA.
2. IDOA emails the program/finance team to initiate the process and prepare the RFI to be sent out.
3. The RFI is released to vendors for review.
4. Respondents return proposals to IDOA by the due date.
5. IDOA distributes responses to the team.
6. Team determines if they would like to proceed with an RFP or not.

Managed Services Provider (Work Order)

What is this?

IDOA has an agreement with Computer Aid, Inc. (CAI) to provide staffing across state agencies. They are also able to bring vendors on for scope of work projects. These are via work orders that are reviewed/signed by IDOA, CAI, and IDOH. These are for specific projects and must have approved guidance from IDOA to move forward with this route. This is used as a short-term solution while a competitive process is started.

What is the process?

1. IDOA lets CAI know that we can proceed with this route.
2. CAI works with the agency and the vendor to get registered under the SOW.
3. The vendor/program create a scope of work/pricing.
4. The CAI team will create the work order document.
5. It is then routed to signatures from the vendor, IDOH, IOT (if needed), IDOA, and CAI.
6. The approved document is sent to IDOH to get a purchase order created.
7. Purchase order is sent to IDOH, IDOA, and CAI.
8. CAI then updates the VectorVMS SOW engagement. Work can begin.

Special Procurement Request

What are they?

This is a last resort to be used when the goods/supplies need to be purchased due to compatibility with a current piece of equipment used at IDOH. This cannot be used without IDOA guidance via the submission of a Letter of Intent (LOI).

What is the process?

1. Finance submits an LOI to IDOA requesting to submit an SPR.
2. IDOA emails IDOH Finance to proceed with submitting the SPR while citing the LOI #.
3. IDOH Finance submits the SPR for review/approval via PeopleSoft Financials.
4. It is routed through IDOA (multiple stops depending on amount), IOT (if needed), and Office of Management & Budget (OMB) (if needed).
5. Once approved, IDOH Finance saves and sends the document back to the requestor to submit RFC packet for contract processing or PO creation depending on good/service provided.

Contract/Grant Agreement Process

1. Ensure your vendor is active in the system and has a bidder ID (*See Pg 28)*.
2. Program manager completes Request for Contract (RFC) form, scope of work, budget, and Procurement Method to form the RFC packet.
    a. If Procurement Method is RFQ, procurement team will have already put together packet once vendor is selected & send straight to contracts team for processing (Skip to Step 8).
3. Program manager sends packet to Division Director for approval.
4. Division Director, once approved, sends packet to Assistant Commissioner.
    a. If it is not over $75,000, the Assistant Commissioner can send it to RFC inbox.
    b. If it is over $75,000, send it for Chief of Staff approval then to RFC inbox.
5. Finance reviews RFC packet
    a. **If vendor is not in the system or funding is not set up, RFC packet will be returned to the program and need to be resubmitted.**
6. RFC team creates a requisition in PeopleSoft. If budget check is valid, it routes for approval to:
    a. Accountant
    b. Controller
    c. Division Director
    d. If the agreement is over $75K, it will also route for State Budget Agency (SBA) approval.
7. Once the REQ is approved:
    a. New Agreement - Finance will source the REQ and then send it on to Contracts team with program contacts CC'd.
    b. Amendment - Finance will send straight on to Contracts team with program contacts CC'd.
8. The Contracts team receives, reviews, and puts the information from the RFC packet into the contract template.
9. The Contracts team runs clearance checks.
    a. If not in good standing with Department of Workforce Development (DWD), Department of Revenue (DOR), or Secretary of State (SOS), the agreement is on hold until the vendor fixes the issue.
10. Contract is routed to Legal (OLA) for review and approval.
11. After OLA approval, it is routed to the vendor signatory contact listed on the RFC & the IDOH department contact for signatures.
12. After both vendor & department signs, it is routed for internal fiscal approval.
13. Once approved, it is then routed for state approval at:
    a. IOT (if involving data, software, etc.) (10 days)

    b. IDOA (5 days)
    c. SBA (10 days)
    d. Attorney General's Office (45 days)
14. Once all state agencies approve, the agreement is finalized/executed.
15. The contracts team requests for the REQ to be dispatched to PO.
16. Procurement creates PO and it is routed for approvals to:
    a. IDOH Fiscal
    b. IDOH Purchasing
    c. IDOA
17. Once approved, Procurement runs budget check, dispatches PO, and sends to contracts team.
    a. If in error, PO will not be able to be dispatched until valid.
18. The contracts team emails the vendor with the signed contract and purchase order stating the agreement is executed.

Invoicing

After vendor has provided the good/service, they can start invoicing.

1. The vendor submits invoice to Invoices@health.in.gov. The invoice must:
    a. Have a current date on the document
    b. A unique invoice# that has not been used in the past
    c. Dates of service (for an agreement only)
    d. Purchase Order number
2. Accounts Payable team reviews the invoice and enters into PeopleSoft through a payable voucher
3. The voucher goes through budget check and is then posted for approvals.
4. It is routed to:
    a. Program area
    b. Finance
    c. Comptroller's Office
5. Once approved, the payment will be deposited into the vendor's bank account after 2 business days.

Purchase Order (PO) Updates

PO Change Requests

Please submit all PO change requests to Purchasing@health.in.gov with Alex Stultz copied.

PO Closure Requests

Please submit all PO closure requests to Purchasing@health.in.gov with Alex Stultz copied. The exception to this is for contractors through CAI. Those requests should be sent to MSP@health.in.gov.

Notes:

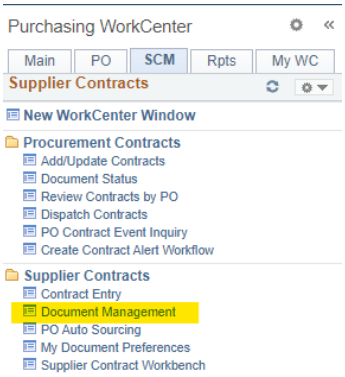
- If the PO is tied to a current/open agreement, a termination of convenience will need to be done unless specified in the agreement that the funding was only good for part of the timeframe. *(Reach out to Louis Hurrle or Alex Stultz to start this process or with any questions)*.
- If you are only wanting to close specific PO lines, we will need the line # along with the PO #.

PeopleSoft Guides

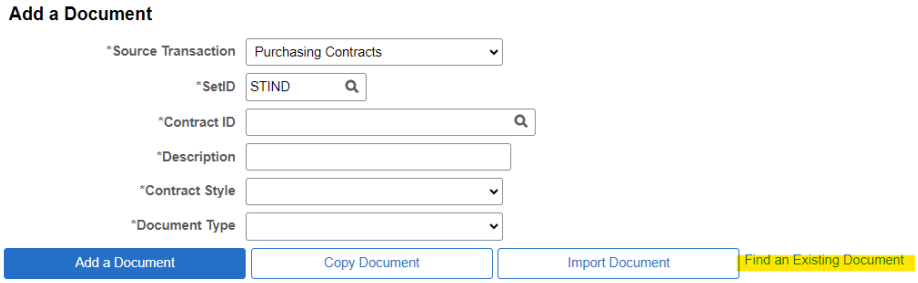
Below are different step by steps to help find information within PeopleSoft, such as contract status, vendor ID's, etc.

Looking Up A Contract in Document Management

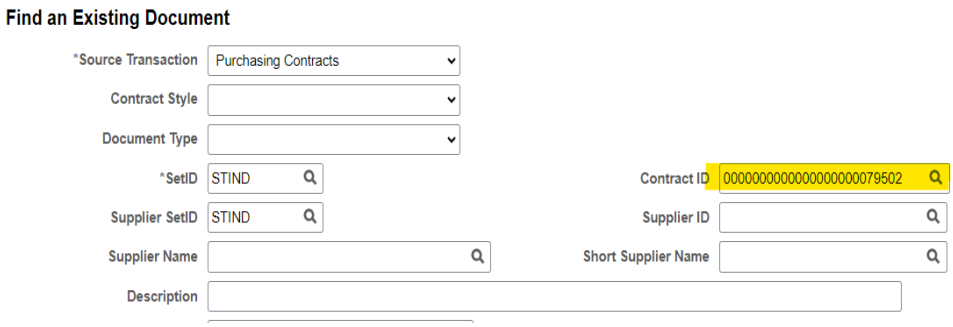
1. Go to Purchasing WorkCenter > Go to SCM tab > Documents Management



2. Once you click on Document Management, click on Find an Existing document on the right side of the page.



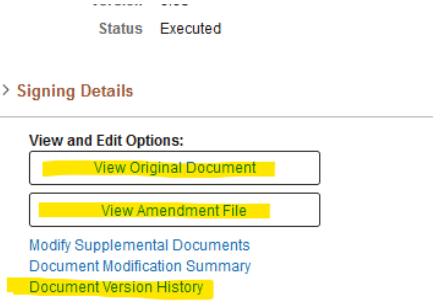
3. Insert the SCM # you are working on under Contract ID and click search:



4. Click on the blue hyperlink containing the SCM # on the bottom of the page:



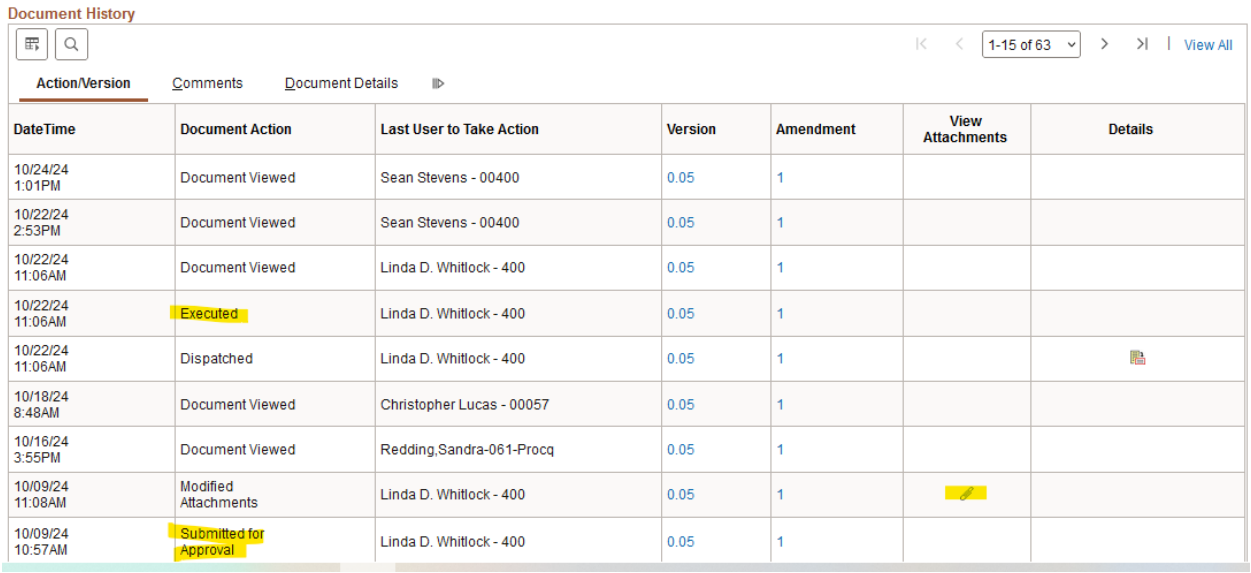
5. Click View Original Document to see the original contract or View Amendment File button to look at the newest amendment to the contract.



6. Click Document Version History

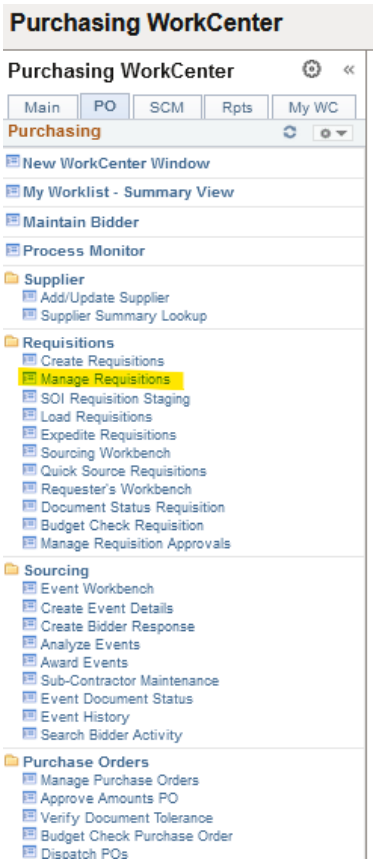
   a. The Document Action shows you any actions that have been made so you can see approvals, if something has been revised, or when it was executed.

   b. If you click the paper clip icon it shows the attachments for the contract, original and amendments.



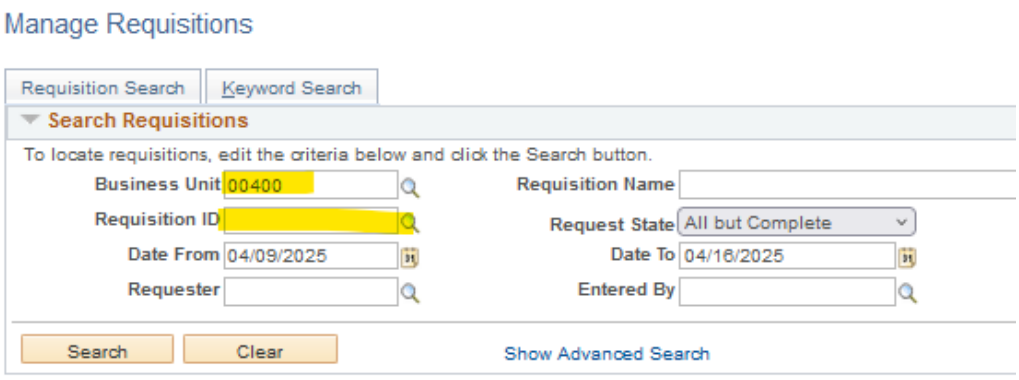
Look Up Requisition Number

1. Go to Purchasing WorkCenter > Go to PO tab > Manage Requisition

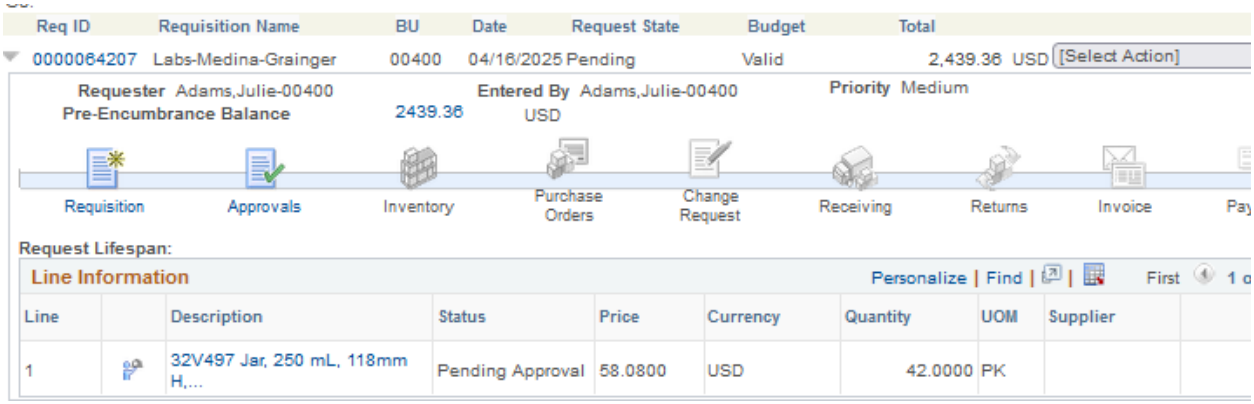


2. Enter the Business Unit & REQ ID

    a. You can remove the dates, change the drop down menu, look up by just business unit & REQ Name, etc. to find what you're looking for

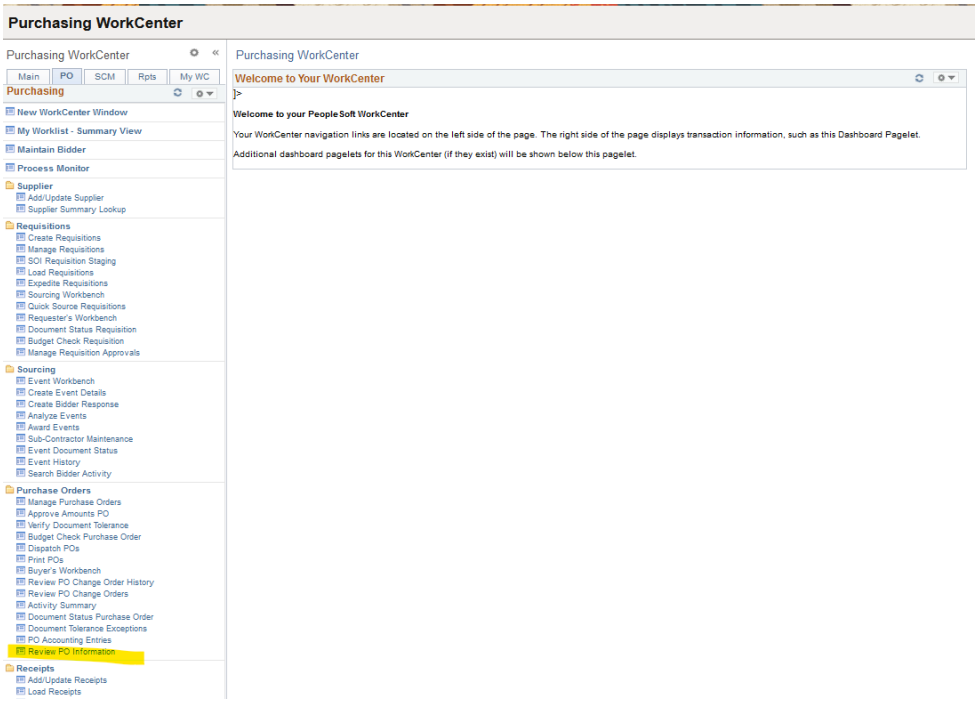


3. Your search pulls up REQ's & you have different things you can look at:
    a. If you click 'Requisition', it pulls up the description, amount, funding, etc.
    b. If you click 'Approvals', it pulls up the approval chain so you can see who it is pending with/who has approved.
    c. If 'Purchase Order' is colored in then you can click this to find the PO # tied to that REQ.

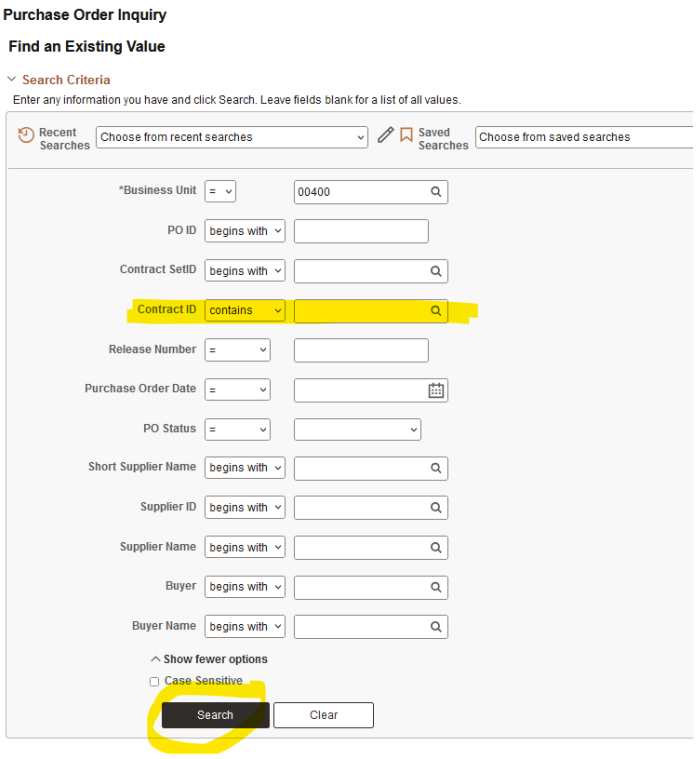


Look Up Purchase Order Number

1. Go to Purchasing WorkCenter > Go to PO tab > Review PO Information



2. Change the Contracts ID drop down option to ‘Contains’ and insert the Contract ID (SCM #). Click Search.

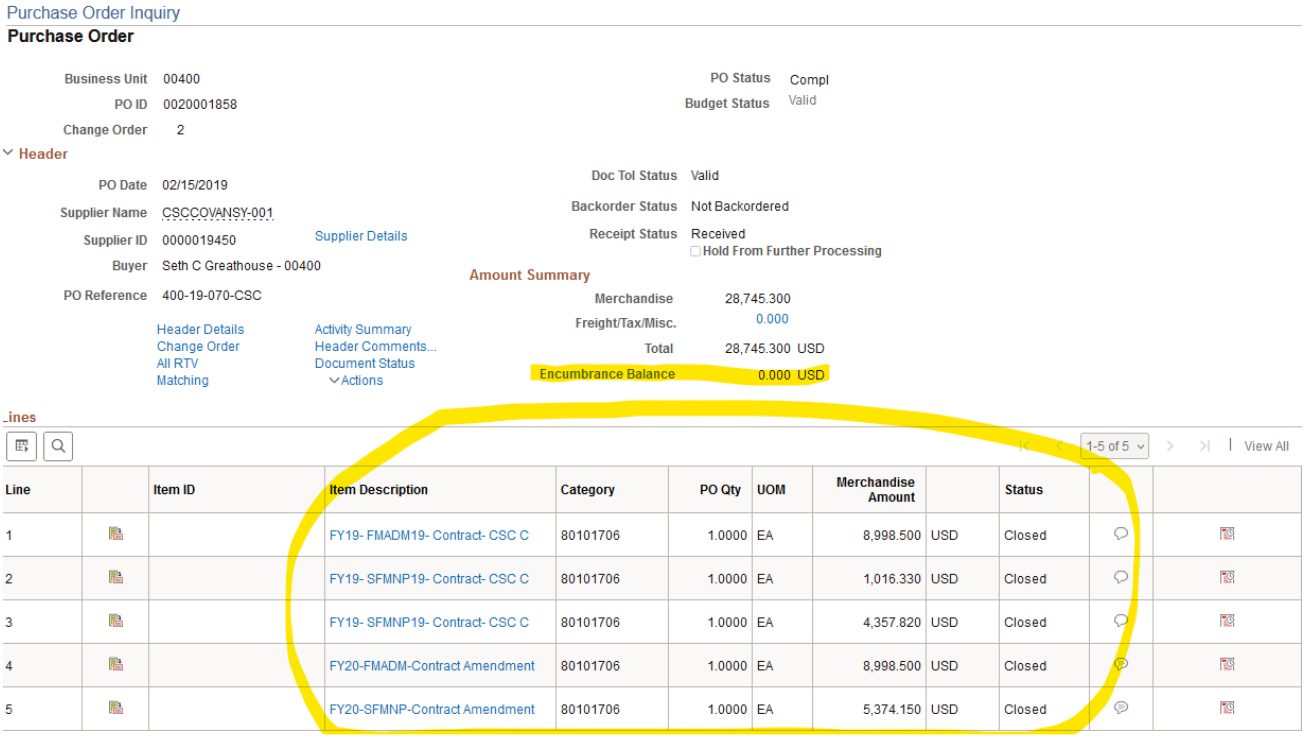


3. You’ll scroll down & there will be lines for any purchase orders tied to that contract.

1-4 of 4

Business Unit	PO ID	Contract SetID	Contract ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	PO Type	Purchase Order Reference
00400	0020001858	STIND	00000000000000000000316402	2/15/2019	Compl	CSCCOVANSY-001	0000019450	CSC COVANSYS CORP	S302236	SpecIProc	400-19-070-CSC
00400	0020001858	STIND	00000000000000000000316402	2/15/2019	Compl	CSCCOVANSY-001	0000019450	CSC COVANSYS CORP	S302236	SpecIProc	400-19-070-CSC
00400	0020001858	STIND	00000000000000000000316402	2/15/2019	Compl	CSCCOVANSY-001	0000019450	CSC COVANSYS CORP	S302236	SpecIProc	400-19-070-CSC
00400	0020001858	STIND	00000000000000000000316402	2/15/2019	Compl	CSCCOVANSY-001	0000019450	CSC COVANSYS CORP	S302236	SpecIProc	400-19-070-CSC

4. You'll click the most recent line and this will bring up the purchase order page showing the PO lines & their descriptions, encumbrance balance (how much is remaining on the PO), and the status of each PO line.



Purchase Order Inquiry

Purchase Order

Business Unit 00400
PO ID 0020001858
Change Order 2
PO Status Compl
Budget Status Valid

Header

PO Date 02/15/2019
Supplier Name CSCCOVANSY-001
Supplier ID 0000019450 Supplier Details
Buyer Seth C Greathouse - 00400
PO Reference 400-19-070-CSC
Doc Tol Status Valid
Backorder Status Not Backordered
Receipt Status Received
Hold From Further Processing

Header Details | Activity Summary
Change Order | Header Comments...
All RTV | Document Status
Matching | Actions

Amount Summary

Merchandise	28,745.300
Freight/Tax/Misc.	0.000
Total	28,745.300 USD
Encumbrance Balance	0.000 USD

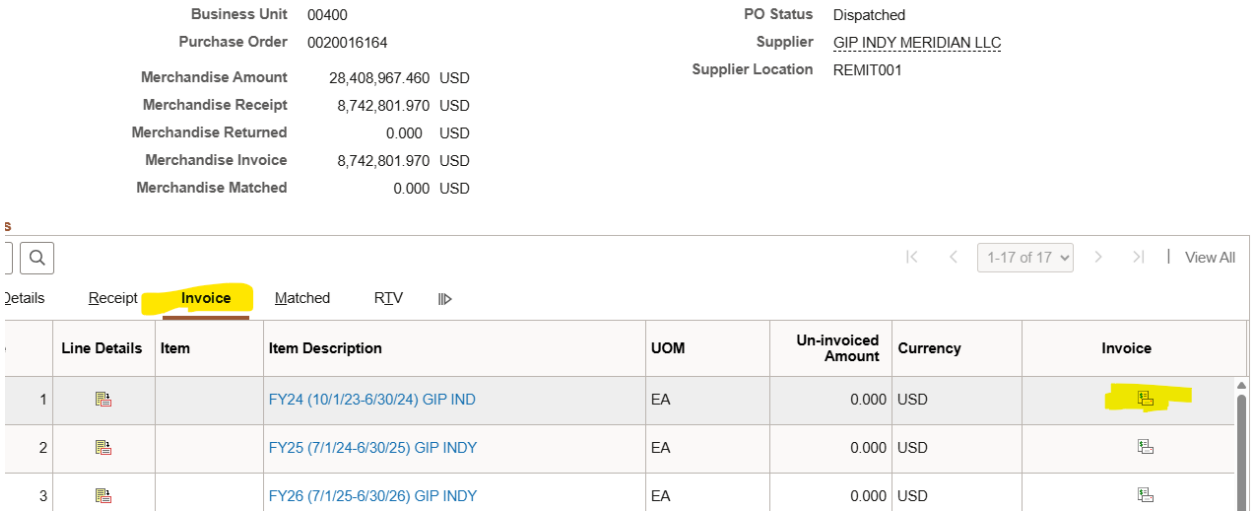
lines

1-5 of 5 | View All

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount		Status
1		FY19- FMADM19- Contract- CSC C	80101706	1.0000	EA	8,998.500	USD	Closed
2		FY19- SFMNP19- Contract- CSC C	80101706	1.0000	EA	1,016.330	USD	Closed
3		FY19- SFMNP19- Contract- CSC C	80101706	1.0000	EA	4,357.820	USD	Closed
4		FY20-FMADM-Contract Amendment	80101706	1.0000	EA	8,998.500	USD	Closed
5		FY20-SFMNP-Contract Amendment	80101706	1.0000	EA	5,374.150	USD	Closed

Finding Invoice from PO Page

1. Click "Activity Summary".
2. Select the "Invoice" tab & scroll right until you see the icon. Click this.



Business Unit 00400
Purchase Order 0020016164
PO Status Dispatched
Supplier GIP INDY MERIDIAN LLC
Supplier Location REMIT001

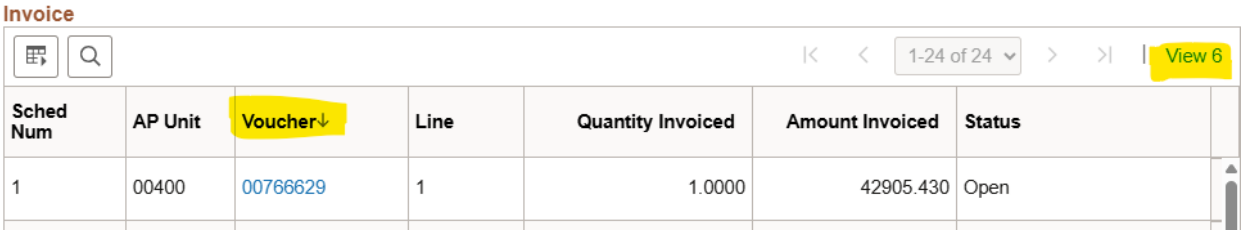
Merchandise Amount	28,408,967.460 USD
Merchandise Receipt	8,742,801.970 USD
Merchandise Returned	0.000 USD
Merchandise Invoice	8,742,801.970 USD
Merchandise Matched	0.000 USD

1-17 of 17 | View All

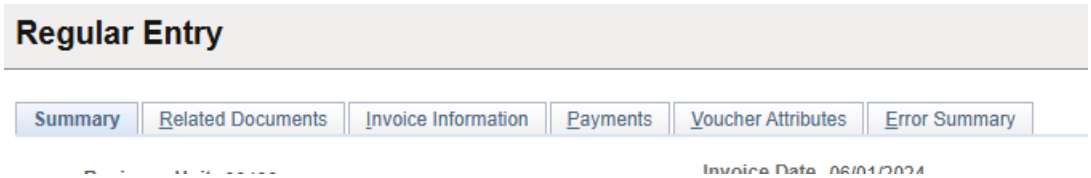
Details | Receipt | Invoice | Matched | RTV

	Line Details	Item	Item Description	UOM	Un-invoiced Amount	Currency	Invoice
1			FY24 (10/1/23-6/30/24) GIP IND	EA	0.000	USD	
2			FY25 (7/1/24-6/30/25) GIP INDY	EA	0.000	USD	
3			FY26 (7/1/25-6/30/26) GIP INDY	EA	0.000	USD	

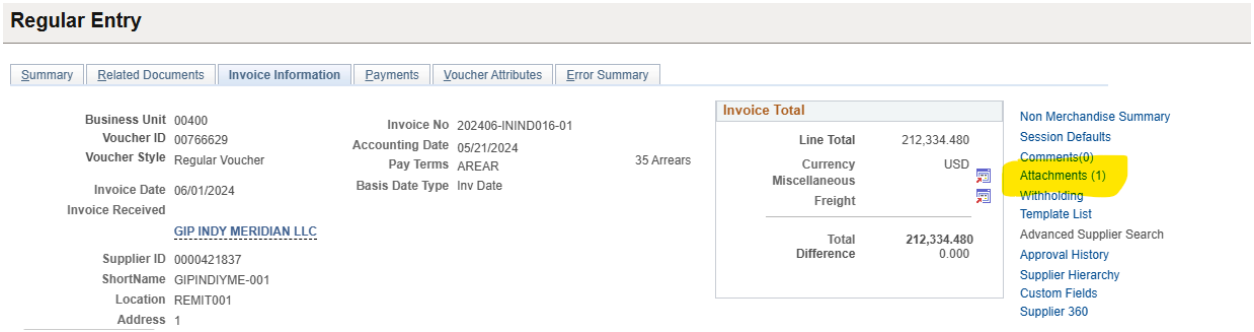
5. Click “View All” & then sort by Voucher number so that the highest is at the top. This will show you the most recent paid.



6. Copy the Voucher ID #.
7. Pull up the Regular Entry page in PeopleSoft (Navigation > Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry)
8. Insert the Voucher ID # or the Invoice #, if you have it.
9. Click “Invoice Information”

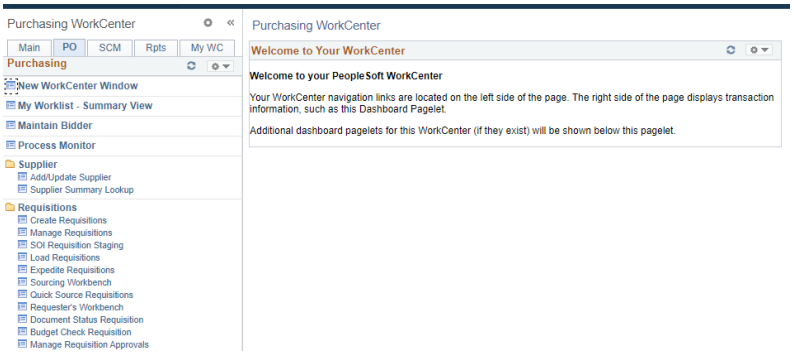


10. Select “Attachments” on the right side of the page. You’ll see a pop up with a document named the Voucher ID #. Open this and it should be a copy of the invoice!

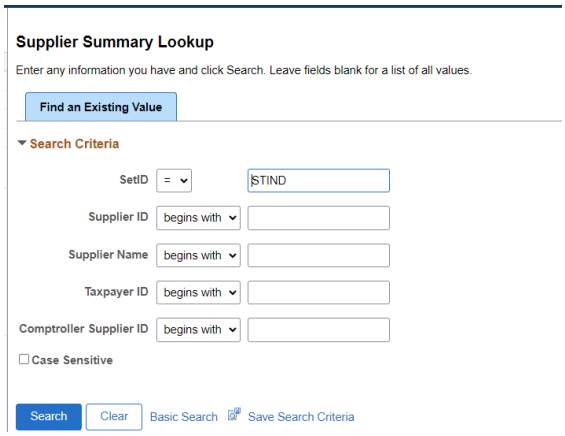


Look Up Supplier & Bidder ID

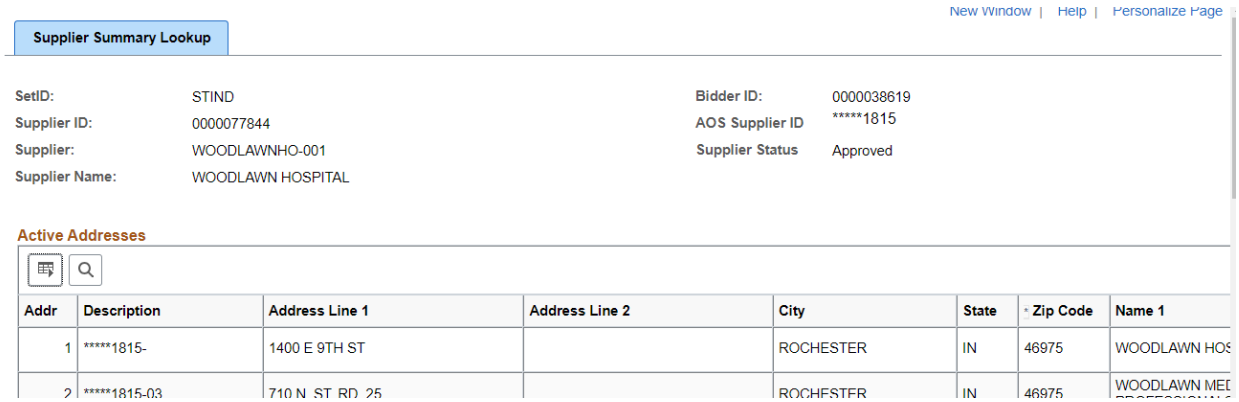
1. Go to Purchasing WorkCenter > Go to PO tab > Supplier Summary Lookup:



2. Enter the EIN in the Taxpayer ID field & click Search:



3. Locate the Supplier ID and Bidder ID. The Supplier ID should be entered as the AOS Supplier ID on the RFC form and the Bidder ID should be entered as the IDOA Bidder ID on the RFC form. Take note of the supplier status, it should be in approved status.



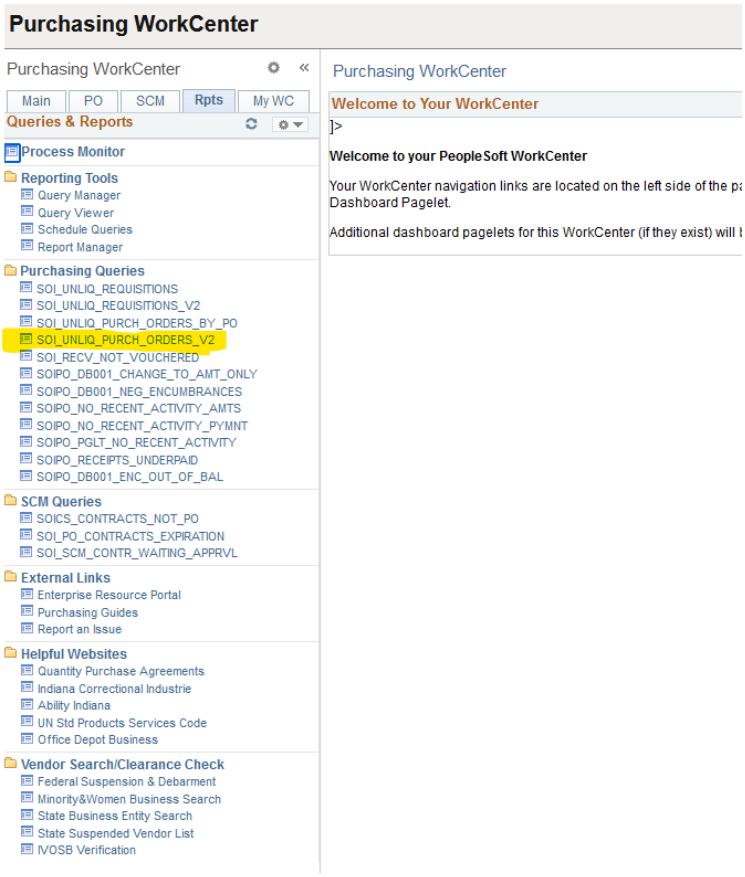
NOTES

- When EIN is entered and no results are shown, double check to make sure the EIN was entered correctly (do not include the dash between numbers). If the EIN provided is correct and no results are shown, the supplier does not have a supplier file.
- If the supplier file is listed as INACTIVE, the supplier will need to submit a W9 and direct deposit form.
- To get registered as a Supplier: Vendor will need to complete a current W9 & Direct Deposit to the program area. (The Comptroller's Office only accepts forms from State agencies/programs.) Please also include information for a vendor contact (name & email address). The program will submit forms & information to the Comptroller's Office via ENCRYPTED email to Suppliers@comptroller.in.gov
    - For any questions, please reach out to Alex Stultz.
- If there is no bidder ID provided, the supplier will need to go to the IDOA Bidder registration site and register for a bidder ID. https://www.in.gov/idoa/procurement/supplier-resource-center/requirements-to-do-business-with-the-state/bidder-profile-registration/

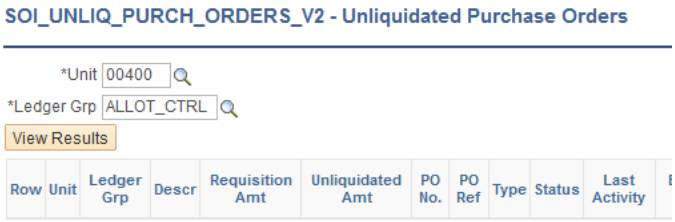
Running the Open Purchase Order Report

1. Go to Purchasing WorkCenter. Click the 'Rpts' tab.

    a. Or you can open Query Viewer and search "**SOI_UNLIQ_PURCH_ORDERS_V2**"



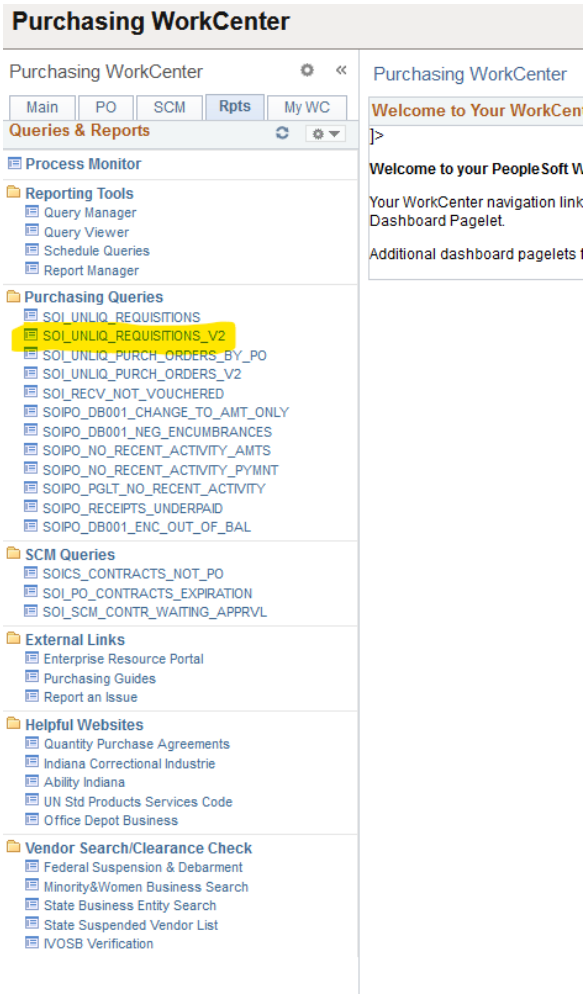
2. Enter Business Unit (00400) & Ledger Group (ALLOT_CTRL). Click 'View Results'.



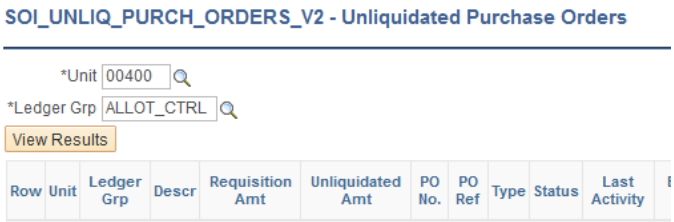
3. Once results populate, click 'Excel Spreadsheet'. It will then be downloaded to your computer. You can then open & filter it for whatever information you are looking for.

Running the Open Requisition Report

1. Go to Purchasing WorkCenter. Click the 'Rpts' tab.



1. Enter Business Unit (00400) & Ledger Group (ALLOT_CTRL). Click 'View Results'.



2. Once results populate, click 'Excel Spreadsheet'. It will then be downloaded to your computer. You can then open & filter it for whatever information you are looking for.

Acronym Breakdown

AG (Attorney General's Office): A separate state agency that reviews/approves agreements. They have up to 45 days to review.
CAI (Computer Aid, Inc.): A vendor that is contracted through IDOA as a QPA. They provide all state agency contractors. They are also used for work orders with various vendors for specific projects. *These must be approved by IDOA before starting*.
IDOA (Indiana Department of Administration): A separate state agency that sets ALL purchasing rules/guidelines. IDOH works closely with them on various procurement methods and uses them to gain guidance on special scenarios.
LOI (Letter of Intent): A form set up by IDOA to gain information on purchasing requests. These forms are submitted by the Procurement team based on the Purchasing Request Forms submitted by the program area.
MOU (Memorandum of Understanding): This is a type of agreement that is between two state agencies.
MSP (Managed Services Provider): This is a QPA agreement between IDOA & currently CAI to provide contractors.
PO (Purchase Order): These are created to encumber the funds to pay the invoices for once the service/product is completed/received.
QPA (Quantity Purchasing Agreement): These are contracts between IDOA and other vendors to give all state agencies access to use them without having to do a full contract process.
REQ (Requisition): A requisition is a pre-encumbrance. This sets the money aside and gives the accounting & program team a chance to review to ensure all information is correct.
RFC (Request for Contract): This is a form that is filled out anytime a grant, contract, or MOU are needed. It gives the Procurement & Contracts teams all of the information they need to process the agreement.
RFI (Request for Information): This is a procurement method that can be used to identify vendors who are able to provide a specific product/service. It does not result in an award, but gives the agency an idea of who to reach out to.
RFP (Request for Proposal): This is a procurement method where IDOH and IDOA work together to create a bid packet that is posted/sent out. Any vendor can submit a bid. The teams then review all bids after the due date passes and score them based on predetermined criteria. A vendor is then awarded, and the contract process begins.

RFQ (Request for Quote): This is a procurement method for bids estimated to cost less than $75,000 that IDOH is able to run themselves. A bid packet is created and posted online for 30 days. Any vendor can submit a bid. The teams then review all bids after the due date passes and determines a vendor to award.

SBA (State Budget Agency): A separate state agency who monitors the budget at IDOH. They help ensure we are not overspending. They approve requisitions over $75,000 and all contracts/grants.

SCM # (Supplier Contract Management): This is the contract # that PeopleSoft assigns to each agreement.

SPR (Special Procurement Request): This is a rare procurement method that is used for unique scenarios in which no other vendor can provide the product/service. IDOA must approve the use of one before it can be submitted.