



OKLAHOMA
Office of Management
& Enterprise Services

Central Purchasing

PROCUREMENT INFORMATION MEMORANDUM

Subject: PeopleSoft ePro Requisition Required Attachments
Effective Date: June 10, 2024
Issued by: Amanda Otis, Esq., State Purchasing Director

I. Introduction

As a means of disseminating relevant state procurement information to state entities, the Central Purchasing Division of Office of Management and Enterprise Services issues Procurement Information Memoranda. To the extent any information in this Procurement Information Memorandum (“PIM”) conflicts with information in a previously issued memorandum, the information in this PIM controls.

II. Summary

PeopleSoft is the statewide accounting platform. According to the Central Purchasing Act, 74 O.S. §§ 85.1-85.44E, the State Purchasing Director has “sole and exclusive authority and responsibility for all acquisitions by state agencies,” and OMES is directed to create requirements for “[t]he time manner, authentication and form of making requisitions for acquisitions.” 74 O.S. § 85.5(A), (C)(1). In an effort to create a more efficient approval process within PeopleSoft, this PIM directs agencies to create requisitions with specified attachments as determined by the type of transaction. Each agency shall comply with the standard set below, or the Central Purchasing Division may deny the requisition. For questions regarding this or any PIM please contact central.purchasing@omes.ok.gov.

III. PeopleSoft ePro Requisition Transaction Types

A. Solicitation Required Attachments

- i. Completed Bidder Instructions;
- ii. Completed Attachment A: Solicitation;
- iii. Agency Terms (Optional);
 - a. If your agency has any specific terms that your agency feels should be incorporated that are not covered by the State’s general terms, this is the place to insert them.
- iv. Evaluation Tool;

- a. *Note: Also include evaluation team members' information either as an attachment or in the comment field of the requisition.*
 - v. For all IT solicitations, the agency shall convert their ServiceNow email confirmation with their PIR Demand Number into a pdf file and upload the attachment into their ePro requisition within the line item details along with all other required solicitation documents. If the ePro requisition for a solicitation does not have this required attachment, the CPO will be required to hold the ePro until it has been completed.
 - vi. IT Security Certification and Accreditation Assessment. (If data is being accessed, processed, transferred or stored); Suggested Supplier List;
 - vii. Applicable Exhibits Examples:
 - a. Pricing Exhibit,
 - b. Exhibits with Mandatory Requirements or Non-Mandatory Specifications,
 - c. Maps for lawn care or grounds work, and
 - d. Any other documents applicable to the solicitation event.
- B. Sole Source Acquisition**- The following items shall be attached to every ePro requisition for a sole source acquisition:
- i. A Sole Source Certification Form (OMES-FORM-CP-002) that shall be signed by the agency's Chief Administrative Officer thereby affirming the submitted information is true and accurate. The form shall be retained in the agency contract file. The form shall not be dated more than sixty (60) days prior to the initial acquisition;
 - ii. A Non-Collusion Certification (OMES-FORM-CP-004). *Note: This is embedded in OMES-FORM-CP-024, so if those terms are used, this form is not additionally required.*
 - iii. Certificate of Insurance;
 - iv. Contract terms and conditions;
 - a. General term Options:
 - 1. Terms and Conditions document negotiated by the agency; or
 - 2. Sole Source Terms and Conditions (OMES-FORM-CP-024). This form may be modified to reflect any negotiated terms of the transaction. *Note: if using form 024 a non-collusion form is not additionally required.*
 - b. IT Terms: For IT acquisitions, the State's IT terms and conditions must be included as well as the hosting agreement, if applicable.
- C. Change Order**- Change Orders to a PO that Central Purchasing previously approved must now be processed by the agency internally. When building your requisition, you must select click the magnifying glass under "Flags" and select "Change Order." You must still attach a pricing document to the requisition to document your transaction. When the requisition is sourced into a PO, you must select the PO Type based on the PO Type and Origin Quick Reference Guide, then select "CHG" as the origin regardless of the original origin. Central Purchasing will be pushing back any change orders that you should be processing internally. Additionally, you should update the buyer on the PO to an agency buyer, so you are getting all relevant notifications about that PO. When changing the buyer, you will get a notice that changing the buyer will change certain defaults; hit cancel on this box.
- D. Authority Orders ("AO") or IT Authority Orders**
- i. Initial Fiscal Year AO require an estimate of anticipated or expected purchases; and

- ii. Recent Invoices or SW Pricing Schedule, whichever is applicable.
- E. COW (“Computer Ordering Widget”) - If utilizing COW, the following attachments are required:
 - i. Pricing document.
- F. Other ePro Requisitions - (Examples include: Fair & Reasonable, release from PS Agency Contract, Professional Services Contracts, State Use orders, and Fixed Rate contracts)
 - i. Pricing document that has not expired and contains SW contract number referenced if applicable.
 - ii. Contracts (if applicable. Fixed Rate, Professional Services, PS Agency Contract Renewal, etc.)
 - iii. Supplier’s Certificate of Insurance, if applicable.