



**OKLAHOMA**  
Office of Management  
& Enterprise Services

## Central Purchasing

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### PROCUREMENT INFORMATION MEMORANDUM

Subject: PeopleSoft ePro Requisition Required Attachments  
Effective date: January 31, 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 OMES Central Purchasing may deny the requisition. For questions regarding this or any PIM, please contact [central.purchasing@omes.ok.gov](mailto:central.purchasing@omes.ok.gov).

#### III. PeopleSoft ePro requisition transaction types

##### A. Solicitation required attachments

- i. Per EO 2023-04, Cabinet Secretary Approval (if exceeds \$25,000 and Cabinet Secretary Approval is not within the PeopleSoft Agency Approval Path);
- ii. Completed Bidder Instructions;
- iii. Completed Attachment A: Solicitation;
- iv. Attachment B: State General Terms;
- v. Attachment C: Agency Terms (Optional);

- vi. Attachment D: State Information Technology Terms (Only required for IT acquisitions);
  - vii. 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.
  - viii. IT Security Certification and Accreditation Assessment. (If data is being accessed, processed, transferred or stored);
  - ix. Evaluation tool;
    - a. *Note: Also include evaluation team members' information either as an attachment or in the comment field of the requisition.*
  - x. Suggested supplier list;
  - xi. 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. Per EO 2023-04, Cabinet Secretary Approval (if exceeds \$25,000 and Cabinet Secretary Approval is not within the PeopleSoft Agency Approval Path);
  - ii. 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;
  - iii. 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.*
  - iv. Certificate of Insurance;
  - v. 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** – For a PO issued by Central Purchasing by a Central Purchasing buyer, the following attachments are required:
- i. Per EO 2023-04, Cabinet Secretary Approval (if exceeds \$25,000 and Cabinet Secretary Approval is not within the PeopleSoft Agency Approval Path);
  - ii. Change Order Request (OMES-FORM-CP-010); and
  - iii. If adding additional funds, a pricing document.

- D. Authority orders (“AO”) or IT authority orders**
- i.** Per EO 2023-04, Cabinet Secretary Approval (if exceeds \$25,000 and Cabinet Secretary Approval is not within the PeopleSoft Agency Approval Path);
  - ii.** Initial fiscal year AOs require an estimate of anticipated or expected purchases; and
  - iii.** Recent invoices or SW Pricing Schedule, whichever is applicable.
- E. Computer ordering widget (“COW”)** – If utilizing COW, the following attachments are required:
- i.** Per EO 2023-04, Cabinet Secretary Approval (if exceeds \$25,000 and Cabinet Secretary Approval is not within the PeopleSoft Agency Approval Path); and
  - ii.** 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.** Per EO 2023-04, Cabinet Secretary Approval (if exceeds \$25,000 and Cabinet Secretary Approval is not within the PeopleSoft Agency Approval Path);
  - ii.** Pricing document that has not expired and contains SW contract number referenced if applicable;
  - iii.** Contracts (if applicable: Fixed Rate, Professional Services, PS agency contract rRenewal, etc.)
  - iv.** Supplier’s Certificate of Insurance if applicable.