

Procedures for Processing Sole Source Documents for Materials

The agency will prepare and forward to DGS a fully approved shopping cart. They will also complete the online Source Justification Form, which will include the Agency shopping cart number for their request and route to DGS.

Note: The Agency no longer needs to use this form for “No Substitute” Materials. The “No Substitute” request should be included in the Internal Note of shopping cart.

Commonwealth of Pennsylvania
SOURCE JUSTIFICATION FORM

The objective of this form is to capture all relevant documentation an Agency may have to assist the Department of General Services/Office of Administration (“DGS/OA”), Bureau of Procurement/Office of Information Technology (“BOPI/OT”), in expediting the source justification review process. This form must be completed electronically, signed, and submitted with all relevant documentation to DGS/OA. If a question is neither mandatory nor applicable, please indicate ‘N/A’. Please use standard terminology and define acronyms.

IT sole sources must first be reviewed and approved through the DCID/CoP process.

* = Required.

New Form Edit Form Status:

The DGS sole source coordinator will be notified via e-mail that a New Source Justification Form was submitted. DGS sole source coordinator will review the request for completeness and will either accept or reject it.

From: RA-pa-emarketplace@state.pa.us [mailto:RA-pa-emarketplace@state.pa.us]
Sent: Friday, March 04, 2016 12:55 PM
To: GS, pa-emarketplace; Reinoehl, Brian
Cc: GS, pa-emarketplace
Subject: A New Source Justification Form ##### was Submitted.

A New Source Justification Form was Submitted. It can be found on [eMarketplace](#). You must [Login](#) before approving. ID# #####

This email was sent from an unmonitored account. Please contact gs-procure@state.pa.us for help.

The Agency will be notified via e-mail that their Source Justification Form has been accepted.

-----Original Message-----
From: paemarketplace@state.pa.us [mailto:paemarketplace@state.pa.us]
Sent: Friday, January 23, 2009 9:57 AM
To: Plecker, Susan
Cc: Cain, Barbara
Subject: Source Justification Form.

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

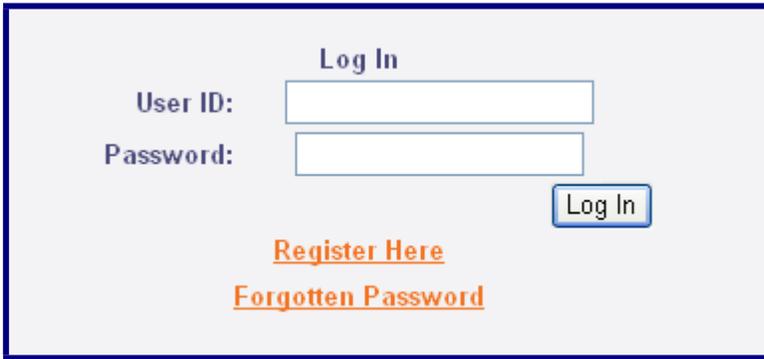
If the Source Justification Form is accepted, the sole source coordinator will assign it electronically to a Commodity Specialist. The sole source coordinator will make sure that the form is correct before assigning to Commodity Specialist.

The request will appear for 10 days on the website after it is accepted for public viewing.

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The Commodity Specialist will receive an e-mail stating that they have a Source Justification Review and the email will provide an ID #.

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



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



Locate correct ID # and select the Details link.

ID	Description	Agency	Category	Proposed Supplier	Awarded \$ Amount	PO#	Status
26571	Test Materials	General Services	Materials	Dawn Eshenour's Services	TBD		Internal: Details

Commodity Specialist will review the Source Justification Form. If required to be returned for correction, the Commodity Specialist will notate what needs to be corrected prior to marking it as "Returned for Correction."



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The form can be downloaded and printed, if necessary. However, paper documents will no longer be routed.

Review Information	
ID:	191
Review End Date:	
Approval/Disapproval Date:	
Awarded \$ Amount:	\$
View Source Justification Form	
Download form as PDF	
<input type="button" value="Edit"/>	

Commodity Specialist will complete a Sole Source Determination Summary Sheet and save to their computer. Please note that the Sole Source Summary Sheet will be available for public viewing, so be clear and concise.

The Summary Sheet must be uploaded to the website Related Docs section. Start by selecting the "Edit" button.

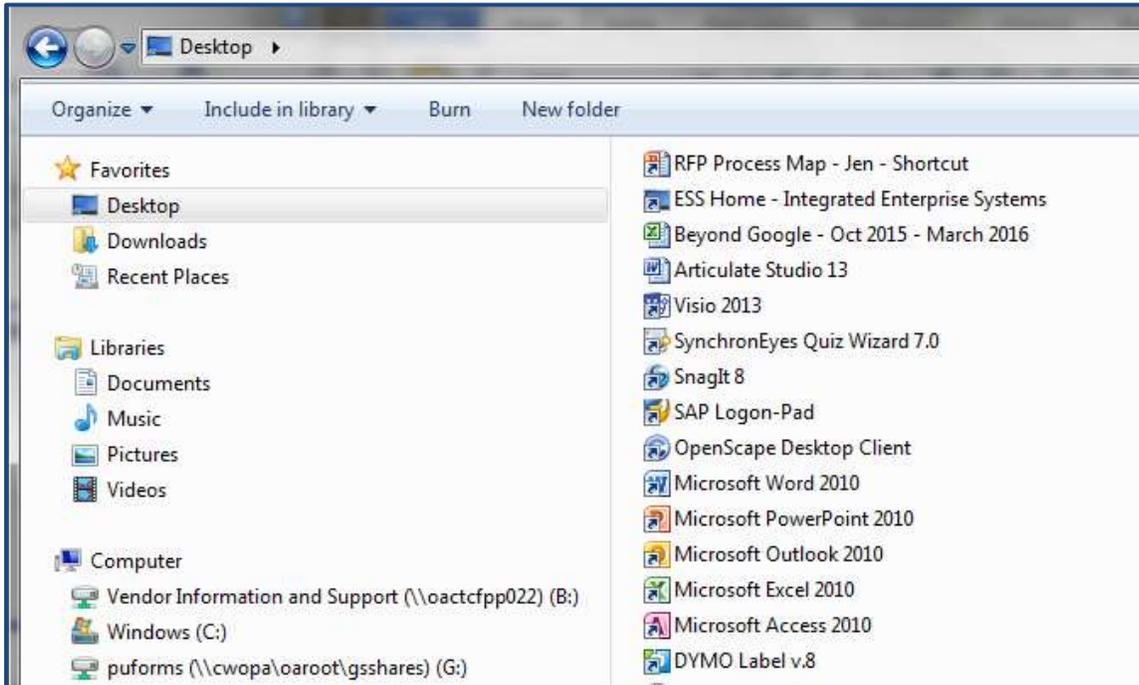
Review Information	
ID:	191
Review End Date:	
Approval/Disapproval Date:	
Awarded \$ Amount:	\$
View Source Justification Form	
Download form as PDF	
<input type="button" value="Edit"/>	

Select "Browse"

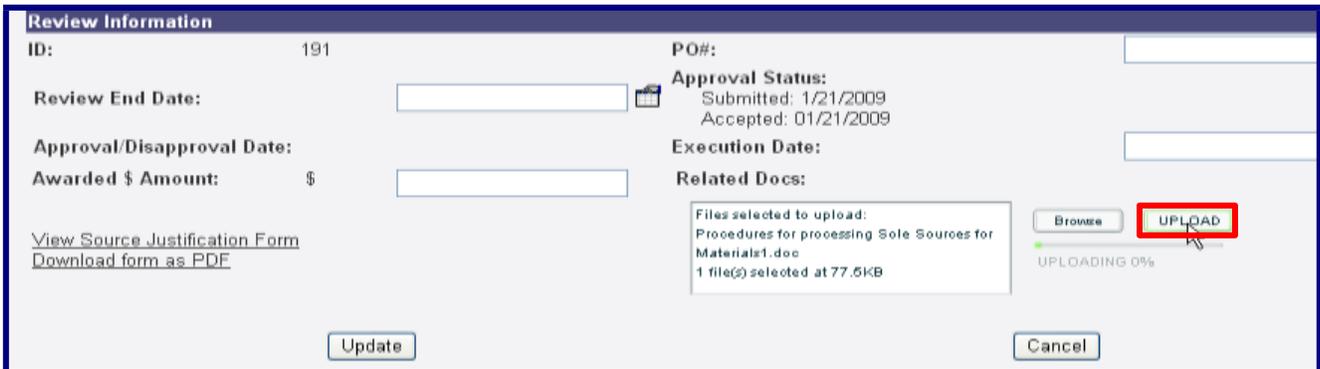
Review Information	
ID:	191
Review End Date:	<input type="text"/>
Approval/Disapproval Date:	<input type="text"/>
Awarded \$ Amount:	\$ <input type="text"/>
View Source Justification Form	
Download form as PDF	
<input type="button" value="Browse"/> <input type="button" value="UPLOAD"/>	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Procedures for Processing Sole Source Documents for Materials

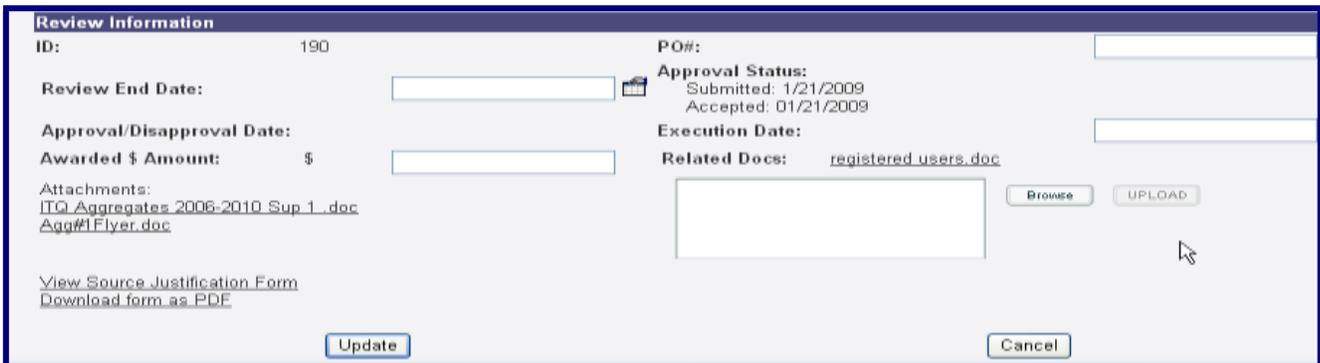
Locate completed form on desktop, and select open.



Select "Upload"

A screenshot of a web application's 'Review Information' form. The form contains several input fields: 'ID' (191), 'PO#', 'Review End Date', 'Approval/Disapproval Date', and 'Awarded \$ Amount'. On the right side, there is an 'Approval Status' section with 'Submitted: 1/21/2009' and 'Accepted: 01/21/2009', and an 'Execution Date' field. Below these is a 'Related Docs' section with a text box containing 'Files selected to upload: Procedures for processing Sole Sources for Materials1.doc' and '1 file(s) selected at 77.5KB'. To the right of this text box are 'Browse' and 'UPLOAD' buttons. The 'UPLOAD' button is highlighted with a red rectangular box. Below the 'UPLOAD' button, it says 'UPLOADING 0%'. At the bottom of the form are 'Update' and 'Cancel' buttons.

Your summary will appear directly above the upload box on the right side of the screen.

A screenshot of the same 'Review Information' form, but with updated content. The 'ID' is now 190. The 'Related Docs' section now shows 'related_users.doc' in a text box. The 'UPLOAD' button is no longer highlighted. The 'UPLOADING 0%' text is still present. The 'Attachments' section now lists 'ITQ Aggregates 2006-2010 Sup 1 .doc' and 'Agg#IFlyer.doc'. The 'Update' and 'Cancel' buttons remain at the bottom.

Procedures for Processing Sole Source Documents for Materials

Select "Approved or Disapproved" in Approval Status drop down box based on your determination.

General Information			
Requesting Agency:	Administration	Commodity Specialist Reviewer:	Susan Plecker
Material or Service:	Materials: test	E-mail:	splecker@state.pa.us
Proposed Supplier:	test	Request Type(s):	Sole Source
Description:	Another Test for Ben - ignore this if you get an e-mail about it... Another Test for Ben - ignore this if you	Estimated \$ Amt:	\$5K - \$10K
		Date Submitted:	2/13/2009
Review Information			
ID:	236	PO#:	
Review End Date:		Approval Status:	Submitted: 2/13/2009 Accepted: 2/13/2009
Approval/Disapproval Date:		Execution Date:	
Awarded \$ Amount:	\$TBD	Related Docs:	
View Source Justification Form Download form as PDF		<input type="button" value="Browse"/> <input type="button" value="UPLOAD"/>	

Select "Update." Source Justification Form is routed to CPO.

Review Information			
ID:	27153	PO#:	
Review End Date:		Approval Status:	Submitted: 5/10/2016 Accepted: 05/10/2016 <input type="checkbox"/> CS Approved
Approval/Disapproval Date:		Execution Date:	
Awarded \$ Amount:	\$	Related Docs:	Sole Source Determination Form.doc Cannot contain special characters
Attachments:	PACER_email_quote.pdf spa_feesched-2.pdf		
<input type="button" value="Browse"/> <input type="button" value="Upload"/>			
View Source Justification Form as PDF			
Click to Remove Files: PACER_email_quote.pdf spa_feesched-2.pdf			

Procedures for Processing Sole Source Documents for Materials

CPO will approve or disapprove.

Review Information

ID: 26775 PO#: [blank]

Approval Status:
Submitted: 3/16/2016
Accepted: 03/17/2016
Approved by Commodity Specialist 04/05/2016
Approved by Chief Procurement Officer 04/05/2016

Review End Date: [blank]
Accepted
Approved
Disapproved
Returned for Correction

Single Source (Used Equipment) Value set by 2 independent 3rd party appraisals.

Approval/Disapproval Date: [blank]

Awarded \$ Amount: \$ [blank] Execution Date: [blank]

Related Docs: SIF 26775 Appraisal 1.pdf
Sole Source Determination Summary 26775 Materials.doc
Cannot contain special characters

Attachments:
Appraisal 2.pdf
Powerhouse Quote-Spec.pdf
UCC 11.pdf

[View Source Justification Form as PDF](#)

Click to Remove Files:
Appraisal 2.pdf
Powerhouse Quote-Spec.pdf
UCC 11.pdf

Approval Routing

Routing Comments: [text area] Routing E-mail: [text field]

Source Justification Form is then routed back to the sole source coordinator who will notify the Commodity Specialist that the Source Justification Form has been approved for processing by the Commodity Specialist.

Commodity Specialist will continue to process sole source shopping cart using the SPR Procedures which are included in the IFB Procedures.

Procedures for Processing Sole Source Documents for Materials

Upon approval and release by the Sole Source Board the sole source coordinator will complete the Source Justification Form with the award information and complete the final approval of the form.

Review Information	
ID:	25643
PO#:	4300478192
Approval Status:	Submitted: 9/23/2015 Accepted: 09/24/2015 Approved by Commodity Specialist 09/25/2015 Approved by Chief Procurement Officer 09/25/2015 Approved by Sole Source Coordinator 11/02/2015
Review End Date:	09/24/15
Approval/Disapproval Date:	
Awarded \$ Amount:	\$256,989.00
Execution Date:	10/30/15
Material or service MUST be compatibis with existing equipment	
Related Docs:	Sole Source Summary.doc ICC Sole Source Letter.pdf
Attachments:	SPEC_032900_PAVEMENT_FRICTION_TESTER.pdf 150609_PADOT Friction Tester Quote.pdf 150609_PADOT Friction Cost Certification.pdf 05327 Bidding Sheet - COMPLETED.pdf Sole Source Purchasing Justification.pdf
View Source Justification Form as PDF	
<input type="button" value="Edit"/>	

The Agency is notified via e-mail that the Sole Source is fully approved. A notification is also sent via e-mail to Department of State.

From: RA-pa-emarketplace@state.pa.us [mailto:RA-pa-emarketplace@state.pa.us]
Sent: Friday, April 08, 2016 2:50 PM
To:
Cc:
Subject: Source Justification Form.

Your source justification has been approved for Test. Your ID# is 199.

Note:

Agencies must send the No Bid Contract letter and the Political Contributions Reporting form to the vendor who has been awarded a non-bid contract by the Commonwealth. The non bid letter template and the political Contributions form can be found [via this link](#) under the Sole Source Preparation Section.

This email was sent from an unmonitored account. Please contact gs-procure@state.pa.us for help.