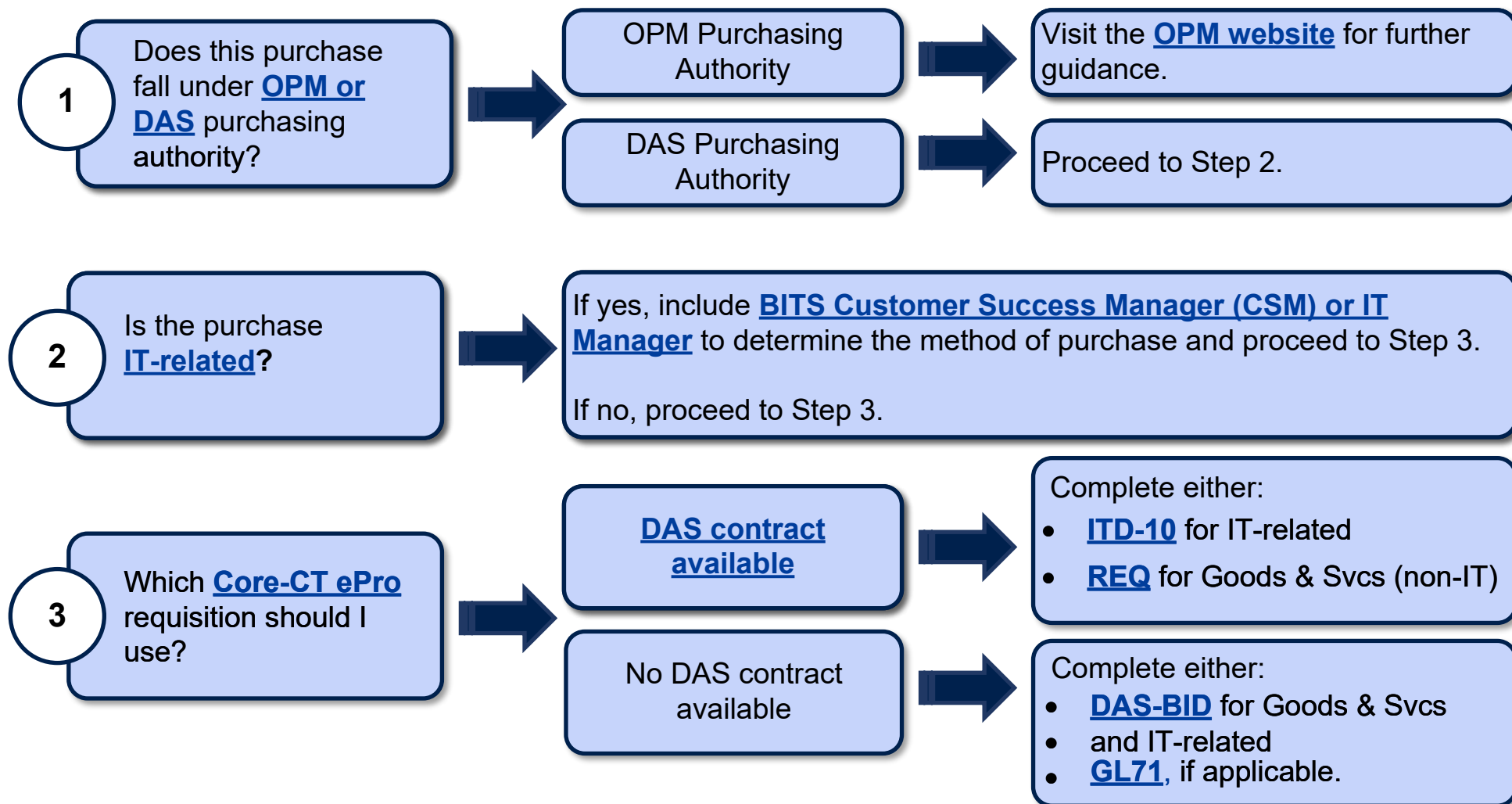




Purchasing 101

Executive Branch Agency Purchase Request Guidance

Need to make a purchase for your agency?
Work with your Business Office to complete the following:



Click on the links for more information.



Call **DAS Procurement 860-713-5095** for further guidance or email **DAS.Procurement@ct.gov**.

How do I determine whether my purchase is through OPM or DAS?

Note: IT purchases must be made through DAS and cannot be made through Personal Service Agreement (PSA) or Purchase of Service (POS) contract types.

OPM

Establishes standards for the procurement of Personal Service Agreements and Purchase of Services for a specific agency

OPM oversees two (2) types of contracts:

- **PSA** (Personal Service Agreement) professional services such as trainers, medical professionals, researchers, and actuarial services.
- **POS** (Purchase of Service Contract) the purpose of obtaining direct health and human services for agency clients, such as Group Homes for Persons w/ Disabilities, Substance Use Disorder Treatment Services, etc.



OPM
860-418-6313 for
further guidance.

DAS

Administers contracts for all Goods and Services including IT-related purchases and Telecommunications

DAS examples include:

- Building Supplies and Services
- Cleaning and Janitorial Supplies and Services
- Engineering Services
- Hardware, Software and IT Consulting
- Office Furniture, Equipment and Supplies
- Printing Supplies and Services
- Management Services
- Security and Safety Supplies and Services, etc.

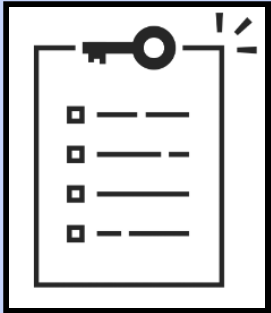


DAS Procurement
860-713-5095 for
further guidance.

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How do I search the Contract Board?

Search By:



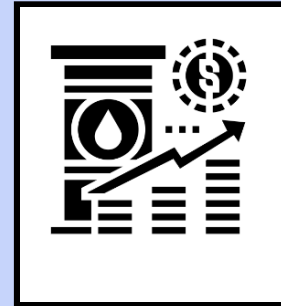
Key Word



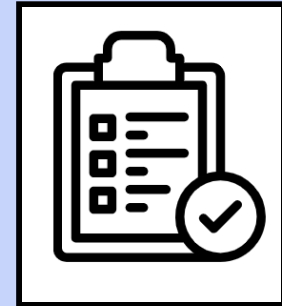
Contractor
Name



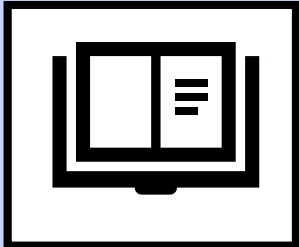
Contract
Number



Commodity
(both goods
and services)



Active Status



Click the link to access the [Contract Board User Guide](#)

Click the link to access the [Contract Board](#)

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How do I determine if my purchase is IT-related?

If the answer is YES to any of the following, your purchase is IT-related:

Nature of the Product or Service	Is the product or service primarily focused on information processing, data management, or communication technologies? Does it involve the use of computers, software, hardware, or electronic devices?
Use of Technology	Does the product or service rely on technology infrastructure such as computer networks, cloud services (computing, applications, platforms), servers, or databases? Is it designed to automate tasks, improve efficiency, or facilitate information exchange?
Digital or Software Component	Does the product involve the development, installation, or maintenance of software applications or systems? Is there a significant software component, such as a mobile app, web application, or desktop software?
IT Industry Classification	Is the product/service classified within the IT industry by relevant industry standards or organizations and fall under categories such as artificial intelligence, software development, hardware manufacturing, IT consulting, or telecommunications?
Data Handling and Analysis	Does the product or service involve the collection, storage, analysis, or visualization of data? Is it used for data processing, data security, or data management?
Internet or Network Connectivity	Does the product or service require internet access or network connectivity for its functionality? Is it related to network infrastructure, cybersecurity, or cloud computing?
Industry Trends and Standards	Does the product or service align with current trends and standards in the IT industry? Is it subject to certifications or regulations specific to IT-related goods and services?
Expert Consultation	Is this consultation with IT professionals or experts in the field who can provide valuable insights into whether a product or service is IT-related?
Market and Customer Perception	Does the target market and customers associate their usage of the product or service with IT or technology?
Legal and Regulatory Considerations	Are there any legal or regulatory definitions or classifications that categorize the product or service as IT-related?

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For non-IT purchases of Goods & Services WITH an active DAS contract:

- 1 Follow the contract usage instructions prior to submitting the ePro requisition in Core-CT.
- 2 Are written quotations required? If **YES**, follow your agency's procedures to complete the requirements below. If **NO**, skip to **Step 3**.
 - Work with your agency Business Office to complete the Request for Quotations (RFQ) from awarded Contractors.
 - If the RFQ requires a detailed Statement of Work (SOW), work with Subject Matter Expert (SME) as needed to complete.
- 3 Follow your agency's procedures to complete and process an ePro REQ requisition in Core-CT to initiate purchase. When your requisition obtains final approval in Core-CT, a valid Purchase Order is issued to the Contractor.



Reach out to the Contract Specialist regarding any questions or requests related to the active contract.



No work shall be performed until a valid Purchase Order is issued.



Agencies shall only sign their specific SOW with the Contractor.

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For IT-Related Purchases **WITH** an active DAS contract:

- 1 Follow the contract usage instructions prior to submitting the ePro requisition in Core-CT.
 - 2 Are written quotations required? If **YES**, follow your agency's procedures to complete the requirements below. If **NO**, skip to **Step 3**.
 - Work with your agency Customer Success Manager (CSM) or IT Manager and/or Business Office to complete the Request for Quotations (RFQ) from awarded Contractors.
 - If the RFQ requires a detailed [Statement of Work \(SOW\)](#), work with your CSM or IT Manager and/or Subject Matter Expert (SME) as needed to complete.
 - If purchase is for a cloud-based solution, work with your CSM or IT Manager to complete the CTDAS BITS Cloud Questionnaire.
 - 3 Follow your agency's procedures to complete and process an ePro [ITD-10](#) requisition in Core-CT to initiate purchase. When your requisition obtains final approval in Core-CT, a valid Purchase Order is issued to the Contractor.
-
-  Some ITD-10 purchase requests require [additional approvers](#) in DAS Procurement; requester should confirm with their CSM/IT Manager (e.g, End User License Agreement (EULA) or Terms of Use).
-  Reach out to the Contract Specialist regarding any questions or requests related to the active contract (e.g., Product Schedule Update (PSU) requests).
-  Agencies shall only sign their specific SOW with the Contractor.

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For Goods and Services and IT-related purchases with NO active DAS contract:

- 1 Work with your agency Business Office and Subject Matter Expert (SME) to provide supporting documentation describing the purchase.
 - If purchase is IT-related, work with BITS Customer Success Manager (CSM) or IT Manager.
 - If purchase is a cloud-based solution, complete the CT DAS BITS Cloud Questionnaire.
- 2 Follow your agency's procedures to complete the ePro [DAS-BID](#) requisition in Core-CT to begin the procurement process. If purchase is IT-related, [ad hoc](#) the appropriate BITS approver for the purchase as per your CSM or IT Manager to Core-CT approval workflow prior to the BID Approver step.
- 3 DAS Procurement will review and evaluate the DAS-BID requisition. An assigned Contract Specialist (CS) will communicate next steps. **Note:** If a DAS contract is identified, the DAS-BID requisition will be denied; the requisition comments will cite the contract number to be used and how to initiate next steps.



Agencies may view an ePro requisition status from the Manage Requisitions page in Core-CT.



[Helpful Hints for IT Purchases](#)

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Helpful Hints for IT Purchases:

Scenario 1 – Your technology purchase on an active DAS contract requires a software license or grant of use license:

DAS Procurement must be involved in the negotiation of all license agreements to ensure compliance with the contract. Work with your CSM/IT Manager to determine if an agreement is included in your purchase. Examples include: Master Service Agreement (MSA); End User License Agreement (EULA); or Terms of Use. Sometimes an MSA, EULA or Terms of Use may be included on an order form; terms and conditions may be embedded within links that require negotiation prior to completing the purchase. Include the CTDAS BITS Cloud Questionnaire as applicable.

To request DAS Procurement, the ITD-10 requester must [ad hoc](#) Leslie Cote, IT Contract Team Leader, after the BITS APPROVAL step in the Core-CT approval workflow; purchase orders cannot be sent to the Contractor until DAS has negotiated and approved the license agreement.

Scenario 2 – Agency is aware of a specific Contractor providing a cloud application using another governmental entity contract (piggyback):

Work with your CSM/IT Manager to complete the CTDAS BITS Cloud Questionnaire and obtain BITS approval. Obtain a quotation from the Contractor, if applicable. Attach a copy of the governmental entity contract, the BITS approved CTDAS BITS Cloud Questionnaire, if applicable, the quotation, along with any other supporting documentation to the DAS-BID requisition.

Scenario 3 – A cloud application with an unknown contractor not on an active DAS contract:

Work with your CSM/IT Manager to complete as many sections as possible of the CTDAS BITS Cloud Questionnaire and Statement of Work. This will assist the Contract Specialist to develop specifications for the solicitation. Attach the CTDAS BITS Cloud Questionnaire and Statement of Work (with any other purchase-related documentation) to the DAS-BID requisition.



An agency is responsible for the preparation, negotiation and execution of an SOW. CSM/IT Manager will assist end user(s) with the technical requirements. DAS Procurement is available as a resource.



Contractor demonstrations must be approved in advance by BITS and include your CSM or IT Manager.

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List of Customer Success Managers and IT Managers

Note: CSM should collaborate with DAS Procurement as needed.

Health and Human Services

Social Services (DSS)
David Labbadia

Mental Health and
Addiction (DMHAS)
Luisa Deprey

Developmental Services
(DDS)
Chris Brennen

Psychiatric Security
Review Board (PSRBO)
Luisa Deprey

Children and Family
(DCF)
Chandra Hegde

Public Health (DPH)
Dennis Mitchell

Health Strategy (DHS)
Beth Lehn

Veterans Affairs (DVA)
Beth Lehn

Early Childhood (DEC)
Dhwani Pandya

Justice and Safety

Corrections (DOC)
Tomasz Kazmierczak

Board of Pardons and
Paroles (BOPP)
Tomasz Kazmierczak

Emergency Services
and Public Protection
(DESPP)
Steve Mann

Military (MIL)
Tomasz Kazmierczak

Criminal Justice
Information Systems
(CJIS)
Archana Mulay

General Admin

Governor and Lt
Governor (OTG, OLTG)
Beth Lehn

Administrative Services
(DAS)
Suchi Behal

Governmental
Accountability (OGA)
Beth Lehn

Commission on Human
Rights and
Opportunities (CHRO)
Suchi Behal

Business and Community

Economic and
Community
Development (DECO)
Jim Mindek

Housing (DOH)
Jim Mindek

Revenue Services (DRS)
Jamie Gamble

Labor (DOL)
Mauro Carducci

Consumer Protection
(DCP)
Scott Grabowski

Workers Comp
Commission (WCC)
Scott Grabowski

Banking (DOB)
Angela Taetz

Insurance (DOI)
Scott Grabowski

Healthcare Advocate
(OHA)
Scott Grabowski

Workforce Strategy
(OWS)
Jim Mindek

Education

Education (SDE)
Michelle Abrahamson

Education (OEC)
Michelle Abrahamson

Technical and
Educational Careers
(CTECS)
Jim Mindek

State Library (CSL)
Beth Lehn

Office of Higher
Education (OHE)
Scott Grabowski

Natural and Physical Resources

Transportation (DOT)
Jose Romero

Motor Vehicles (DMV)
Vacancy

Energy and
Environmental
Protection (DEEP)
Angela Taetz

CT Siting Council (CSC)
Angela Taetz

Office of Consumer
Counsel (OCC)
Angela Taetz

Agriculture (DoAG)
Jamie Gamble

Agriculture
Experimentation Station
(AES)
Jamie Gamble

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