

PASS Requisition Entry Standards for Pipeline or other Contracts Requiring Hours Based Requisitions - 2019

Step 1

Before requisitioners can create an Hours-Based PASS Requisition to utilize Pipeline or other contracts that are hours based you need the appropriate roles in PASS. Submit a User Maintenance (UM) Request to add the following role:

- Create Services PO

Notes:

You must have the *Create Services PO* role before you can create an hours-based (e-timesheet) requisition. You are not asking for permission to Create a Purchase Order (PO), this is just what the role is titled in order to create a Request in PASS. **Do not select the Edit function.**

Step 2

Start with creating a PASS requisition using the **Hours-Based PO** option.

- Select Start Date and End date.
 - Continuation of resource: October 1, 2018 – 12-month Anniversary Date
 - Recompete position – every Pipeline position must be recompeted before their 12-month anniversary date.
 - New Resource: Date of PO Initiation – September 30, 2019

The FY2019 requisition title should include a space-dash-space combination of characters between each of the six required elements:

Element	Description	Notes
Element #1	Onboarding Status of the Pipeline Resource	<ul style="list-style-type: none"> ▪ Continuation – Resource continuing into FY2019 ▪ New – Competition for new Resource ▪ Modification - (only if a Version is being submitted to reduce/add hrs) ▪ Recompete – 12-month anniversary of existing Resource (different from crossing over from one FY year to the next) ▪ De-encumbrance – Remove all funds remaining only AFTER the last invoice is paid.
Element #2	Proposed Contracting Method	IT Consultants (PIPELINE)
Element #3	Fiscal Year19	Each requisition MUST include the fiscal year it is submitted in.
Element #4	Agency Acronym	Include your agency acronym in all related requisitions.
Element #5	Labor Category Title	The Labor Category Title should be identical to the job category selected from the contract
Element #6	Fund Type	Identify the type(s) of funding used <ul style="list-style-type: none"> ▪ Local Fund ▪ IntraDistrict ▪ Federal Grant ▪ O'Type ▪ Capital ▪ Capital ID

Example:

New - IT Consultants (PIPELINE) - FY19 - OCTO – Data Architect (Master)– Local

Non Pipeline

NEW – IT Consultants – FY19 – OCTO Data Architect (Master) - Local

NOTES:

- Please DO NOT enclose the requisition title in quotes or type it in all capital letters.
- PASS Analytics and BI Dashboard Reports separates the title into multiple data fields by using the dash as the data delimiter.

- Ensure that there are NO more than one subsequent dashes in the requisition title.

Step 3

All FY2019 RQ's must include an OAPT number. It will help assist with giving OCP proper lead times for procurements.

FY2019 OAPT#- Pipeline IT consultants (Only OCTO)

- OAPT22688 (Local Funds)
- OAPT22685 (Other Funds)

FY2019 OAPT # - Pipeline IT consultants (All Agencies)

- OAPT22676 (All Funds)

Step 4

The requisition should include the job category and the NTE Bill Rate stated in the PeopleFluent Requirement. If using other type contract the Labor Category and Hourly Rate associated with the CLIN. These rates are listed in the DC Pipeline Bill Rate Card in the contract (see Pipeline SOP document) or in the Master of Contract of DCSS/GSA contract you are using.

To add job category and rate information onto the rate card you must click on **ADD** button to make the fields available for typing.

Step 5

Add the line description options:

Name of the Resource:

- New Resource: TBD (OCP will add the resource name once candidate is selected. Last Name, First Name. As identified in the engagement list).
- Continuation Resource: Add Last Name, First Name, MI.
- Recompete Position: Treated as new Resource – do not enter the name of the incumbent.

Labor Category: This should be identical to the RQ title and the job category stated in the contract under the DC Pipeline Bill Rate Card or DCSS/GSA contract.

Job Title: This should be the internal title/role assigned to the position in PeopleFluent or other contract.

Period of Performance: the length of time that services or goods may be delivered per a District contract.

- Continuation Resource: October 1, 2018 – 12-month Anniversary Date
- Recompete Position: Date of RQ Submission – end of fiscal year or 12-month anniversary date (OCP will update the PO start date based on the PO Initiation Request.)
- New Resource: Date of RQ Submission – September 30, 2020 (OCP will update the PO start date based on the PO Initiation Request.)

NTE Rate: Select the NTE Bill Rate stated in the contract under the DC Pipeline Bill Rate Card. (not needed in DCSS/GSA)

Actual Rate: Leave blank. Will be added by OCP

Hours: estimated 1960-2080 (cannot exceed 12-month max allocation)

Requirement ID: PeopleFluent Requirement Number

Engagement ID: PeopleFluent Engagement Number. Leave blank will be added by OCP.

- Note: Please DO NOT COPY FY2018 PO's. Create new requisitions.

Example for Pipeline:

Name of the Resource: Black, Joe

Labor Category: Computer Scientist (Journeyman)

Job Title: O365 Adoption Specialist

Period of Performance (PoP): 10/01/18-09/30/19

NTE Rate: \$61.20

Actual Rate:

Hours: 1980

Requirement ID: 496861

Engagement ID: 567897 (to be added by OCP upon PO Initiation Request)

Example for non Pipeline Requirements:

PASS Requisition: RQ994341

Resource Name: Sims, Raja N

Labor Category: **Business Functions Analyst IV**

Job Title: **Business Analyst**

Period of Performance (PoP): **8/14/2018 – 9/30/2019**

Actual Rate: **\$116.28**

Hours: 312

Requirement ID: N/A

Engagement ID: N/A

DCSS Acme – CWXXX; CLIN1005

Step 6

Enter quantity - Enter number of hours (should not exceed the 12 month anniversary).

Step 7

Enter Price - Select the NTE Bill Rate stated in the contract under the DC Pipeline Bill Rate Card.

Note: This Price should be the same as the Rate Card and is the cost of the resource for one hour. The **Amount will be based on Hours x Rate.**

Step 8

Enter Commodity Code - Navigate to the Commodity Group section. Select Commodity Code that best represents the service type. The two options are:

9182930 - Consulting Services related to the implementation of Software

9182810 – Consultant Services, Computer Systems/Networking

Step 9

Enter Supplier - OCP must select the supplier per the contract. Requisitioners do not have access to this field. Only when it's a modification of an already approved Purchase Order (PO) to add/reduce/modify the data, the

requisitioners can copy the original RQ or line item then can select the supplier per the contract (in this instance Computer Aid, Inc. (CAI)). Be sure that CAI is entered as the supplier, NOT the resource's company.

Step 10

Select Contract Number - Navigate to the contract section and enter the Contract Number – **CW46503 (or the DCSS/GSA contract you may be using)**

Step 11

Select funding attributes - It is recommended to submit all IT Consultant Requisitions using SOAR OBJ 0417/0407 (unless approved by agency AFO to use alternative OBJ). Please make sure the fund is loaded by the agencies in the correct OBJ.

Note: All Pipeline Resources should be awarded a new PO that is aligned with the Fiscal Period. Regardless of funding all PO's should be retired at the end of the fiscal Period.

Step 12

Comments section should be filled out in details. Must include at a min:

- Whether the RQ is to fund a new resource or an existing one.
- Funding is to cover the from Start to end Date
- Identify reasons if the funding is not to cover for the full duration of the engagement

Step 13

Other Items - Attach the PeopleFluent Requirements or attach a copy of the SOW to justify the funding used. All IT requisitions funded with capital funds must have a detailed SOW specifying the tasks to be performed to ensure capital eligibility guidelines.

Note: Only one resource can be linked with a PO.

Step 14

Once the candidate is selected and background check is successfully completed, CAI will notify OCP via email with the requested engagement details. OCP will add the name of the resource and supplier. OCP will process the PO.

It is the Program Manager's responsibility to submit a User Maintenance Form in PASS to link the new PO to the resource:

For existing resources:

1. Go into PASS and select Create User Maintenance Request
2. Title: (type the following) Adding FY19 Purchase Order and Updating Supplier - Resource Name
3. Maintenance Selector: click Maintain
4. User – search by the person's name – click select on the right to select the name
5. Click Next
6. In Supplier Line – on right side under Change To click on drop down box and search for your supplier - click select on the right to select the supplier (again, be sure that CAI is selected)

7. In New Timesheet Order: Add the new FY19 PO#
8. Click Next
9. Click **Submit**

For new resources you must follow the below steps:

1. Go into PASS and select Create User Maintenance Request
2. Title: (type the following) New FY18 Pipeline Purchase Order - Resource Name
3. Maintenance Selector: click Add
4. Click Next
5. Login : first name. last name *-make sure you put . (dot with no spaces) between first and last name*
6. Full Name: last name, first name
7. Title - RQ title and the job category
8. Deliver to: First Name Last Name (of contractor)
9. Ship to: Agency and Program
10. Supervisor: Actual person supervising (FTE)
11. Management Level: 9
12. Email Address: this must be a dc.gov email address assigned to this Resource
13. Phone Number: Best number to reach this Resource
14. Agency:
15. Batch Number: search for your Agency in the drop down
16. Supplier: Computer Aid, Inc. New Timesheet Order: Add the new FY18 PO#
17. Add Roles: Contractor, Create Timesheet, Change Timesheet (3 selections)
18. Click Next
19. Click **Submit**