

Questions from PASS Users	Answers from PASS Analyst
<p>Problems:☹</p> <p>☹ Removal of attachments and comments made in error by program staff. ☹</p> <p>☹ Change orders when PO has been issued to the wrong vendor name.</p> <p>1</p>	<p>Can only remove an attachment if the rq is in composing status. Once submitted it cannot be deleted. Cancel PO and create new RQ to correct vendor.</p>
<p>Supplier E Form view in PASS</p> <p>2</p>	<p>Only AP specialists, contract specialist, supplier eform view, and contracting officer roleholders can view</p>
<p>Would like to discuss have a catalog for DCPS products.</p> <p>3</p>	<p>Contact OCP for more information</p>
<p>Updated Vendors Lists</p> <p>4</p>	<p>Contact OCP for more information</p>
<p>De-obligate, Negative receipting, re-opening the purchase order for change.</p> <p>5</p>	<p>PASShelp.dc.gov- Have receiver click reopen order from Receive option on Swoosh (search for PO). Put the amount you want to remove in the Accepted column (example, -12), Have requestor go to RQ and bring the line amount down to what was spent</p>
<p>Explain the new procedures on vendor selection by OCP?☹</p> <p>There are new issues when OCP makes changes in PASS; the change doesn't connect to SOAR?☹</p> <p>How many requisition modification (funding changes) can be done prior to a purchase order fully approved? ☹</p> <p>The PASS approval flow should have extend time (3 days) before coming back to the requisitioner.☹</p> <p>6</p>	<p>1. Contact OCP for more information 2. What changes? 3. Any amount of changes can be made prior to order 4. 3 day rule not applied to contract specialist or contracting officers. 3 day rule applies to all other roles then automatically withdrawn if not approved by a role holder, if the rq is waiting on a person's approval-after 3 days the rq escalates to his or her supervisor</p>
<p>Purchase Order (PO) should be closed only in PASS not in SOAR. When PO's are closed in SOAR and not in PASS there is no check and balance. ☹</p> <p>7</p>	<p>True. That is best practice and always advised. There have been some cases where due to PASS issues, the PO had to be closed in SOAR.</p>
<p>I processed federal grant reimbursements to Local Education Agency / subgrantees in the Payment Tracking System (PTS). During this process, I verified purchase orders in SOAR for funds availability for each reimbursement and submit the request to the Receiver for processing if funds are available. However, there are times when the Receiver will denied the PTS order stating that there is no purchase order in PASS or that the funds are insufficient. Why is the Receiver not seeing the PO in PASS when the Processor can see the PO in SOAR with sufficient funds on the purchase order?</p> <p>8</p>	<p>1. Could be the way the search is performed- are they putting in PO and the number, clicking enter instead of search, using the # symbol, AP specialist may see invalid PO if using the wrong vendor to pull up PO. Use the vendor ID that's on the PO to pull up the PO on the invoice. 2. Could be that receiving was done incorrectly. Or split accounting clarification needs to take place</p>
<p>Recently I facilitated an in-house training session for about 16 OSSE PASS Users. The following issues were surfaced to me: ☹</p> <p>☹ (1) Integration Errors - Has this been resolved? any changes in the previously recommended work around of "withdrawing" the RQ?☹</p> <p>☹ (2) OSSE users have reported that the subset of commodity codes are not always accessible/visible.☹</p> <p>☹ (3) RQ's automatically withdraw instead of escalating to a supervisor. Please address why this does not happen.</p> <p>9</p>	<p>1. Yes, integration error resolved. Feb. 18</p> <p>OCP and OCTO are pleased to announce the release of PASS Release 5.4 on February 17th, 2011. Release notes can be found on PASS's support page at <a href="http://passhelp.dc.gov">http://passhelp.dc.gov</a>. Along with other enhancements, PASS 5.4 resolves the EBI PASS/SOAR integration error that was reported in January. Users should not experience the EBI error on documents created after February 17th. Current documents in the system may continue to experience the problem, however.</p> <p>2. Contact OCP for more information 3. Reference # 1</p>
<p>Printing Reports☹</p> <p>Adding comments and Attachments☹</p> <p>Updating PASS Approver information</p> <p>10</p>	<p>Select Excel format then print from excel 2. Add comments and attachments when it's in your box for approval. Add comments at anytime. 3. Depends on if you are updating chain of command approvers or roles. The first is by Management levels and supervisors. Add roles to individual user profiles.</p>
<p>1) Is it possible to delegate some e-docs without completely deactivating a user's profile?☹</p> <p>2) Can we run reports in PASS by organizational codes.☹</p> <p>11</p>	<p>1. All docs by reassignment feature in UM or individual docs by changing on behalf of desired user. 2. Some reports can be filtered by org code. Have to look at the fields to see if the option is present</p>
<p>I am a new user. I have roles assigned to me that I do not understand. Also, I need to have some roles assigned to me that I do not yet have. How do I go about getting this done?</p> <p>12</p>	<p>View roles on PASShelp.dc.gov. Add roles through UM (Maintain). UM will go through the approval flow to validate request. If fully approved, the role will be assigned to the user.</p>
<p>how do you narrow down commodity codes so that not all vendors are included on solicitations?</p> <p>13</p>	<p>Contact OCP for more information</p>
<p>Why is PASS showing a different amount for balances than SOARS and I have had this problem happen 3 times. Example Pass PO # 347903 shows \$20,966.00 and SOAR shows only \$10,483.00 I need to know what is the problem.</p> <p>14</p>	<p>EBI DOC error same issue. The doc numbers rolled over and are now being reused. SOAR uses a combination of the Agency Code and the number itself to determine uniqueness. Duplicate doc numbers caused the PO modification not to get processed in SOAR.</p> <p>Create a new RQ for the modification. The problem has since been resolved.</p>