



Oklahoma City
PUBLIC SCHOOLS

Sole Source Justification & Illegal Purchase Updates
- and -
Filtering Incoming Cognito Notifications

February 19, 2024
Training

Sole Source Justification



Eligible for Sole Source

- This vendor is the only vendor that can manufacturer or provide this specific product that meets the requirements.
- This service provider is the only vendor that can provide the service needed during the time frame specified.
- This consultancy is the only one with the unique mix of experience and knowledge/skill set that can provide the service needed in the timeframe.
- This vendor is the only one who can provide maintenance services on this piece of equipment that they manufactured, no one else is certified to do so.

VS

~~Not Eligible~~ for Sole Source

- I have worked with this vendor in the past and liked their work.
- This vendor provides a great discount (*price is never a justification for a sole source*).
- I was recommended to use this vendor by a fellow researcher.
- A product that is made by one manufacturer but sold through many distributors.



Sole Source Justification

Recent Changes



- ****NEW - Complete the checklist by clicking each proceeding box - indicating each step has been completed;**
- Fill in the Funding Source Name and Email if Cognito offers blanks below -and-
- Click the "Send to 1st Approver" button in the bottom left corner.

Thank you!

Requestor

Requestors Email

Requestor's Signature *

Date Requested

x

draw type

Click the 'Enter' button after completing your signature.

Creator Check List

- | | |
|--|--|
| <input checked="" type="checkbox"/> Verify Need for the Purchase | <input checked="" type="checkbox"/> Provide Sole Source Letter from Vendor |
| <input checked="" type="checkbox"/> Verify Budget for the Purchase is Available | <input checked="" type="checkbox"/> Provide Qualifying Reasons for Sole Source Status |
| <input checked="" type="checkbox"/> Verify the Vendor is not a Prime Vendor | <input checked="" type="checkbox"/> Provide Detail of Effords Made to Find Alternate Vendors |
| <input checked="" type="checkbox"/> Verify Sole Source Authorization is Required | |

The checklist above **MUST** be completed before this form can be submitted for approvals.



Each item listed in this area must be completed & checked off. Complete the items in the order they are listed.



Illegal Purchase

***New for FY24**

<https://www.okcps.org/Page/320>

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Purchasing

The Purchasing Department operates as the exclusive authority to obligate the District for Goods and Services under Policy C-11. All purchases are reviewed for quality, quantity and kind of material to ensure compliance with the Board approved authorizations, Competitive Bidding Act and Board Policy. As required, the Purchasing Department will prepare RFQ (Requests for Quotation) or RFP (Requests for Proposals) and/or Invitation to Bid (ITB) for construction in excess of \$50,000 and for purchases in excess of \$250,000. (Also See Regulation C-11-R1)

Orders, commitments or purchase requisitions (PR) by any other employee are not binding on the District and will result in the review by Management for the Illegal Purchase (IP) if the Purchase Order (PO) is not completed BEFORE receipt of the goods or services.

The Vendor Application Form is available by clicking Vendor Application Form. The W-9 form on the back MUST be provided also. Send completed forms to purchasing@okcps.org. All requests are reviewed for contractor/employee classifications as well as in appropriate vendor/employee relations.

Vendors can also view all open Request for Quote (RFQ), Request for Proposal (RFP) and Invitation to Bid (ITB) on the [Purchasing RFQ](#),

Contact

For any purchasing questions or assistance, please contact
Purchasing at: purchasing@okcps.org

Quick Links



Let's go green!

Forms are in PDF format allowing users to complete forms and insert an eSignature without printing. For best results, save a copy of the forms to your computer before completing.

- How to Upload an Attachment to a PR
- [Illegal Purchase](#)
- ME2K Instruction for Open POs by Cost Center
- ME5A Display Purchase Requisitions



OKCPS FY24 Illegal Purchase Form

Entry #
FY24_1000

Valid District purchase orders are required by Oklahoma State Law, Board Policies, Regulations or Guidelines. The purpose of this notification is to inform you that your actions were in violation of District Policy D-14 & Oklahoma State School Law, Section 160.

Location * Requisition Number * Funding Source * Original PO Date *

Click your cursor in the field above and begin typing your location. Enter the last 5 digits of your cost center.

Vendor Name * Vendor ID * Explanation of Illegal Purchase *

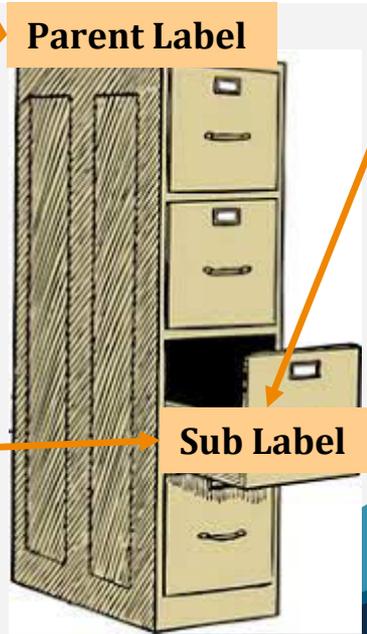
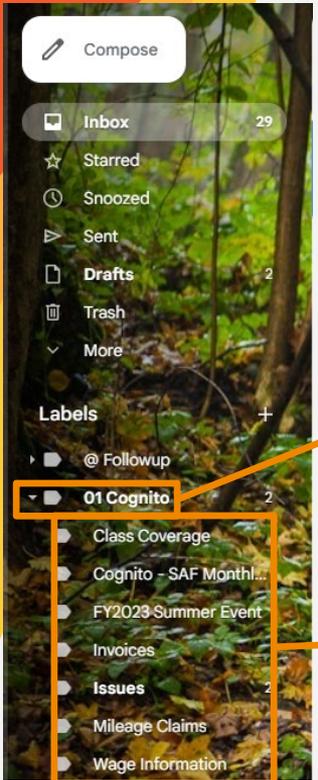
Preparers Information

Preparer's Name * Preparer's Email * Submitted Date Preparer's Signature *



Filtering Incoming Cognito Notifications

- Gmail allows users to set up filters; capturing & routing emails to predetermined labels.
- Gmail uses the term 'Label' for what we might consider a folder.
- The user may set up a '**Parent**' label and add as many '**Subsequent (Sub)**' labels as needed. The **Parent label is the Filing Cabinet**, the **Sub labels are the drawers in the Filing Cabinet**.



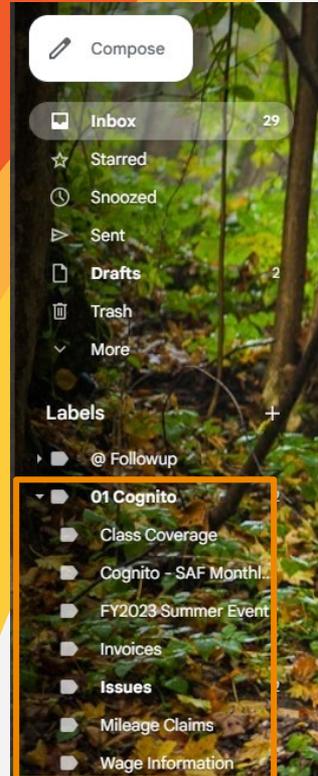
Filtering Incoming Cognito Notifications



Helpful Hints

- Gmail sorts labels in **Numeric** then **Alpha** order. Placing **01** at the beginning of the label name ensures the label will be sorted to the top of the list of labels.
- Sorting Cognito forms into Sub labels can be accomplished by identifying the words contained in the subject line of notifications. An example would be using words '**Class Coverage**' to capture incoming Class Coverage / Loss of Plan email notifications.
- **Please Note:** Sub labels are not required. Depending on your preference, it is fine to filter all notifications from Cognito into one Parent label.
- After these filters are in place, Gmail will file your forms until you are ready to review and approve; **or** final notifications of approval can be kept in a label until they are needed for reference; this process simplifies tracking down documentation.

The following slides are illustrations of the steps to set up filters. If you'd like to follow on your own laptop, open Gmail and we can begin.





Creating 'Parent' Labels

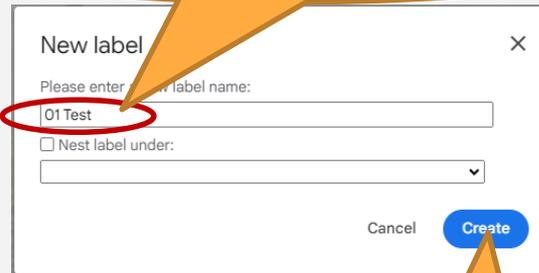
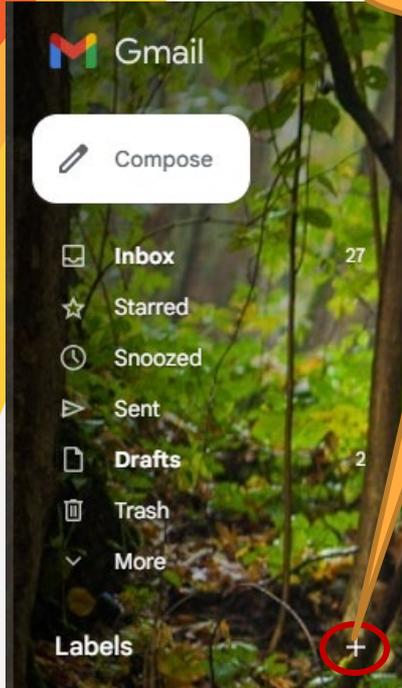
In the illustration below, I'm creating a Parent Label named '01 Test'.

1. Click the (+)

2. Type in the Parent name.

3. Click "Create"

4. Parent Created





Creating 'Sub' Labels

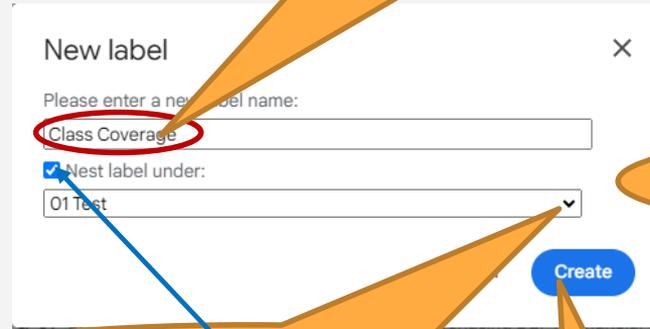
1. Click the (+)

2. Type in the Sub name.

3. Click the blue checkbox;
Then click the dropdown to select a
Parent Label name.

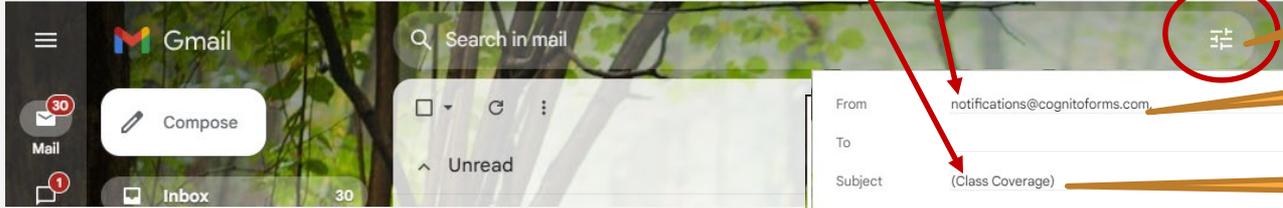
4. Click "Create"

5. Sub Label is 'Nested' under
the Parent Label.



Defining the Filter

In this step we will tell Gmail what information to look for in the incoming email notifications and what to do with them.
Let's filter 'Class Coverage' notification emails.



1. Click Here

2. Email 'From'

3. Subject Line

4. Create Filter

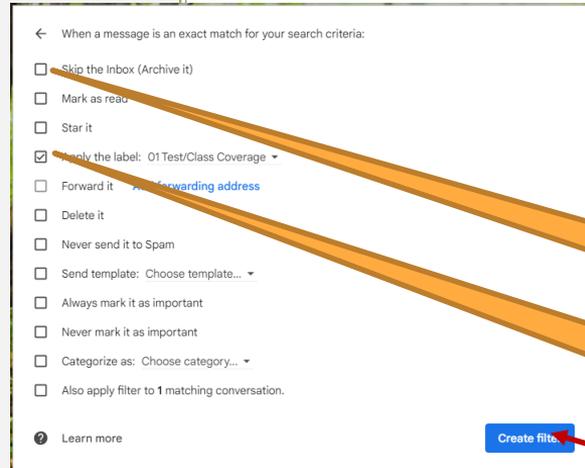
5. Click 'Skip the Inbox'

6. Select the Label and click Create Filter

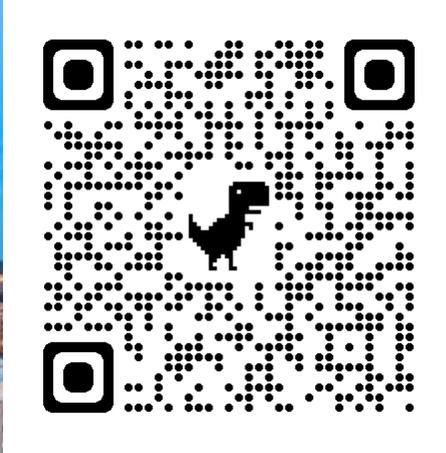
All Cognito notifications come from:
notifications@cognitofirms.com

****We've created each of the form types to have unique subject lines identifying the type of approval / information being requested. ****

Using () when entering subject line information is helpful in capturing forms with slight text variations.



Need more help with GMail?
Scan this QR Code.



Questions?

Please email me at blbanks1@okcps.org if you are interested in working with me today after lunch on Filtering or any other Cognito issue. Thank You!!