As part of the Contracts workflow in Ohio|Buys, agencies can request an IT Release & Permit (R&P) for applicable Agency-Administered IT contracts. To do this, the Agency Contract Analyst who is responsible for the contract will click the IT checkbox on the header of the contract, populate the remaining contract details, and submit the contract.

Once any Supplier negotiations and internal agency approvals are received, the contract will then automatically route through the IT R&P process. Reviewers that are involved in the IT R&P process will receive email notifications from Ohio|Buys as their review is required for a contract.

Depending on your role in the IT R&P process, please refer to the following pages of this job aid:

• IT SME Assignment: Pages 2-4
• IT SME Review: Pages 5-7
• IT SIM Group Review: Pages 8-10
• EITC Analyst Assignment: Pages 11-13
• EITC Analyst Review: Pages 14-16
• EITC Analyst Supervisor Review: Pages 17-19
• DAS DCPO Review: Pages 20-22
• State CIO, DAS CPO, or DAS Director Review: Pages 23-25

▲ State CIO and DAS CPO review is required if the contract’s not exceed amount is greater than $500,000.
▲ DAS Director review is required if the contract’s not exceed amount is greater than $5,000,000.

Once the necessary approvals have been received as part of IT R&P process for a contract, a R&P will be generated and will be linked on the Release & Permit field on the header of the contract. The contract will then automatically route back to the Agency Contract Analyst who is responsible for the contract who can then seek Controlling Board approval (if needed) and route the contract for signature.

The IT R&P that is created as part of this process will have the following attributes:
• The Approval Date will be equal to the contract’s Effective Date
• The Expiration Date will be equal to the contract’s End Date
• The R&P Amount will be equal to the contract’s Not to Exceed Amount

IT users who have the Release & Permit Table Performer profiles assigned are able to review the full details of a R&P from the Browse R&P page.
Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the Object hyperlink for any tasks that have an Action of IT SIM Group to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the Object name.

Review the details of the contract on the Header tab.

**State Contract Number**
92-002290

**Name**
American Association of Motor Vehicle Administrators

**Contracting Entity**
DP5-Dept of Public Safety

**Supplier**
AMERICAN ASSOCIATION OF MOTOR

**Minimum Contract Purchase Amount**
3293000.00

**Market Type**
OPEN: Open Market

**Sourcing Project**

**Public Comments**
Processing FY22 & FY23 Biennium Contract #92-002290 - Renewal Controlling Board Shell Number DPS0100874- Subscription Services with Supplier (AAMVA) to continue services to access “Commercial Drivers License Information System” - “SSN Verification” - “US Passport Verification Services,” etc. “These amounts requested include a 5% contingency for (approximate) increases in costs related to possible transactions volume changes over the next biennium” (Verbiage included “CB DOC” in Explanation of Request Section). Please see “AAMVA Cost Summary” attached.

**Release and Permit**

**Contract Group**

**Biennium Fiscal Year 1**
2022 - State of Ohio

**Biennium Fiscal Year 1 Amount**
1,617,000,000

**Biennium Fiscal Year 2**
2023 - State of Ohio

**Biennium Fiscal Year 2 Amount**
1,676,000,000
Step-by-Step Instructions for Assigning IT SMEs

Navigate to the **Negotiated Terms** tab to continue reviewing the contract details.

![Image of Negotiated Terms tab]

- **Contract: 92-002290** - American Association of Motor Vehicle Administrators - (Running)
  - Estimated Contract Value: USD
  - Revenue Share %: Only Accept Pcard Orders
  - Delivery Terms
  - Warranty Terms
  - Payment Terms: Due Immediately
  - Additional Payment Terms
  - Payment Type
  - Renegotiation Threshold

Navigate to the **Documents** tab and review any applicable contract documents.

![Image of Documents tab]

- **Main Documents**
  - FY22 & FY23 Vendor Signed Renewal AAMVA Quote Letter 2016-21 / Contract 92-002290
    - Version: V1
    - Last Modified Date: 6/11/2021
  - FY222 & FY23 Supplier Signed AAMVA - Ohio Membership Dues & Fees Quote / Contract 92-002290
    - Version: V1
    - Last Modified Date: 4/15/2021

- **Supplemental Documents**
  - AAMVA Cost Summary
    - Contact: EBBINGHAUS Robert
    - Last Modification (UTC-4): 6/14/2021 12:34:24 PM
    - Creation Date (UTC-4): 6/14/2021 12:34:24 PM
  - FY22 & FY23 Controlling Board Sheet - DPH03505874
    - Contact: EBBINGHAUS Robert
    - Last Modification (UTC-4): 6/14/2021 12:32:39 PM
    - Creation Date (UTC-4): 6/14/2021 12:32:39 PM
  - FY22 AAMVA Products and Services Catalog
    - Contact: EBBINGHAUS Robert
    - Creation Date (UTC-4): 4/15/2021 11:21:46 AM
  - DPI Legal Clarification & AAMVA Contract
    - Contact: EBBINGHAUS Robert
    - Last Modification (UTC-4): 4/15/2021 11:19:30 AM
    - Creation Date (UTC-4): 4/15/2021 11:19:30 AM
After completing your review you decide that additional IT SME review is not required, navigate to the Header tab of the contract and click the Bypass IT SME? checkbox icon. Otherwise, skip this step and proceed to Step 6.

**General information**

- **Contract ID**: CTR005609
- **Status**: IT SIM
- **Contract Type**: Agency Administered
- **Contract Sub-Type**: General Services Agreement
- **Bypass Negotiation?**: On
- **Override Contract**: Off
- **Public?**: On
- **Sole Source**: Off
- **Single Source**: Off
- **IT**: On

**Bypass IT SME?**

---

**Step 6**

a) Navigate to the Workflow tab.
b) Enter and select the name(s) of the IT SME(s) you wish to assign in the IT SME field. Please note, if you selected Bypass IT SME? on the Header tab, you should select yourself as the IT SME.
c) Click IT SIM Assign.
Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the Object hyperlink for any tasks that have an Action of IT SME Review to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the Object name.

Review the details of the contract on the Header tab.

<table>
<thead>
<tr>
<th>State Contract Number</th>
<th>Index Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>92-002290</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Contract Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Association of Motor Vehicle Administrators</td>
<td>Ebbinghaus Robert</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contracting Entity</th>
<th>Bill Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>DP5-Dept of Public Safety</td>
<td>Do Not Bill</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Catalog Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMERICAN ASSOCIATION OF MOTOR</td>
<td>No Catalog</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Contract Purchase Amount</th>
<th>Request to Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>3293000.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Market Type</th>
<th>Sourcing Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPEN: Open Market</td>
<td></td>
</tr>
</tbody>
</table>

Public Comments:
Processing FY22 & FY23 Biennium Contract #92-002290 - Renewal Controlling Board Shell Number DPS0100874- Subscription Services with Supplier (AAMVA) to continue services to access “Commercial Drivers License Information System” - “SSN Verification” - “US Passport Verification Services,” etc. “These amounts requested include a 5% contingency for (approximate) increases in costs related to possible transactions volume changes over the next biennium” (Verbiage Included “CB DOC” in Explanation of Request Section). Please see “AAMVA Cost Summary” attached.

<table>
<thead>
<tr>
<th>Pre Governance Contract</th>
<th>On Hold</th>
</tr>
</thead>
<tbody>
<tr>
<td>√</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Biennium Fiscal Year 1</th>
<th>Biennium Fiscal Year 1 Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022 - State of Ohio</td>
<td>1,617,000,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Biennium Fiscal Year 2</th>
<th>Biennium Fiscal Year 2 Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023 - State of Ohio</td>
<td>1,676,000,000</td>
</tr>
</tbody>
</table>

Create a R&P for an Agency-Administered IT Contract
Step-by-Step Instructions for Completing IT SIM Review

1. Navigate to the **Negotiated Terms** tab to continue to reviewing the contract details.

   ![Contract Details](image)

   - **Estimated Contract Value**: USD 3,293,000.00
   - **Currency**: USD
   - **Contract Not to Exceed**: 3,293,000.00
   - **Revenue Share %**: Only Accept Pcard Orders
   - **Delivery Terms**: Empty
   - **Warranty Terms**: Empty

2. Navigate to the **Documents** tab and review any applicable contract documents.

   ![Documents](image)

   - **Main Documents**
     - FY22 & FY23 Vendor Signed Renewal AAMVIA Quote Letter 2016-21 / Contract #92-002290: V1, 6/11/2021
     - FY222 & FY23 Supplier Signed AAMVIA - Ohio Membership Dues & Fees Quote / Contract 92-002290: V1, 4/15/2021
   - **Supplemental Documents**
     - AAMVIA Cost Summary: Internal Document (Approved)
     - FY22 & FY23 Controlling Board Shell - DP00300874: Internal Document (Approved)
     - FY22 AAMVIA Products and Services Catalog: Internal Document (Approved)
     - DPS Legal Clarification & AAMVIA Contract: Internal Document (Approved)

   ![Additional Payment Terms](image)

   - **Due Immediately**
   - **Additional Payment Terms**
   - **Payment Type**
   - **Renegotiation Threshold**
Click **Submit.**

5

Enter a summary of your review and any applicable comments in the **Reason** field and then click **Confirm.**

6
Create a R&P for an Agency-Administered IT Contract

Step-by-Step Instructions for Completing IT SIM Group Review

Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the Object hyperlink for any tasks that have an Action of IT SIM Group to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the Object name.

Review the details of the contract on the Header tab.
Step-by-Step Instructions for Completing IT SIM Group Review

Navigate to the **Negotiated Terms** tab to continue to reviewing the contract details.

Navigate to the **Documents** tab and review any applicable contract documents.
Step-by-Step Instructions for Completing IT SIM Group Review

5

a) Navigate to the Workflow tab.
b) To review a previously submitted comment, hover over and click on a Speech Bubble icon in the Approval History.
c) Click Approve.

6

Enter a summary of your review and any applicable comments in the Reason field and then click Confirm.
Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of *EITC Workload Manager* to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the **Object** name.

Review the details of the contract on the Header tab.
Step-by-Step Instructions for Assigning an EITC Analyst

Navigate to the **Negotiated Terms** tab to continue to reviewing the contract details.

Navigate to the **Documents** tab and review any applicable contract documents.

---

**Contract: 92-002290 - American Association of Motor Vehicle Administrators - (Running)**

- **Estimated Contract Value**: USD
- **Currency**: USD
- **Contract Not to Exceed**: 3,293,000.00

**Payment Terms**
- **Due Immediately**: 
- **Additional Payment Terms**: 

**Delivery Terms**

**Warranty Terms**

---

**Main Documents**

- **FY22 & FY23 Vendor Renewal AAMVA Quote Letter 2016-21 / Contract #92-002290**
  - **Version**: V1
  - **Last Modified Date**: 6/11/2021
  - **Document Type**: Other Documents

- **FY22 & FY23 Supplier Signed AAMVA - Ohio Membership Dues & Fees Quote / Contract 92-002290**
  - **Version**: V1
  - **Last Modified Date**: 4/15/2021
  - **Document Type**: Other Documents

**Supplemental Documents**

- **AAMVA Cost Summary**: Internal Document (Approved)
  - **Contact**: EBBINGHAUS Robert
  - **Last Modification (UTC-4)**: 6/14/2021 12:34:24 PM
  - **Creation Date (UTC-4)**: 6/14/2021 12:34:24 PM
  - **Validity End Date**: 1

- **FY22 & FY23 Controlling Board Seal - DPI0300874**: Internal Document (Approved)
  - **Contact**: EBBINGHAUS Robert
  - **Last Modification (UTC-4)**: 6/14/2021 12:32:39 PM
  - **Creation Date (UTC-4)**: 6/14/2021 12:32:39 PM
  - **Validity End Date**: 1

- **FY22 AAMVA Products and Services Catalog**: Internal Document (Approved)
  - **Contact**: EBBINGHAUS Robert
  - **Last Modification (UTC-4)**: 4/15/2021 11:21:46 AM
  - **Creation Date (UTC-4)**: 4/15/2021 11:21:46 AM
  - **Validity End Date**: 1

- **DPS Legal Clarification & AAMVA Contract**: Internal Document (Approved)
  - **Contact**: EBBINGHAUS Robert
  - **Last Modification (UTC-4)**: 4/15/2021 11:19:30 AM
  - **Creation Date (UTC-4)**: 4/15/2021 11:19:30 AM
  - **Validity End Date**: 1

---

12
Step-by-Step Instructions for Assigning an EITC Analyst

a) Navigate to the Workflow tab.
b) To review a previously submitted comment, hover over and click on a Speech Bubble (💬) icon in the Approval History.
c) Enter and select the name(s) of the EITC Analyst(s) you wish to assign in the EITC Analyst field.
d) Click Assign EITC Analyst.
1. Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of *EITC Analyst* to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the **Object** name.

   ![My pending validations](image)

2. Review the details of the contract on the Header tab.

   ![Contract details](image)

   - **State Contract Number**: 92-002290
   - **Name**: American Association of Motor Vehicle Administrators
   - **Contracting Entity**: DPS-Dept of Public Safety
   - **Supplier**: AMERICAN ASSOCIATION OF MOTOR
   - **Minimum Contract Purchase Amount**: 32930000.00
   - **Market Type**: OPEN: Open Market
   - **Sourcing Project**: 
   - **Public Comments**: Processing FY22 & FY23 Biennium Contract #92-002290 - Renewal Controlling Board Shell Number DPS01000874- Subscription Services with Supplier (AAMVA) to continue services to access "Commercial Drivers License Information System" - "SSN Verification" - "US Passport Verification Services," etc. "These amounts requested include a 5% contingency for (approximate) increases in costs related to possible transactions volume changes over the next biennium" (verbiage included "CB DOH" in Explanation of Request Section). Please see "AAMVA Cost Summary" attached.
   - **Pre Governance Contract**: 
   - **On Hold**: 
   - **Biennium Fiscal Year 1**: 2022 - State of Ohio
   - **Biennium Fiscal Year 1 Amount**: 1,617,000,000
   - **Biennium Fiscal Year 2**: 2023 - State of Ohio
   - **Biennium Fiscal Year 2 Amount**: 1,676,000,000
   - **Index Number**: 
   - **Contract Responsible**: Ebbinghaus Robert
   - **Bill Type**: Do Not Bill
   - **Catalog Enabled**: No Catalog
   - **Request to Purchase**: 
   - **Business Unit**: 
   - **Controlling Board Number**: 
   - **Release and Permit**: 
   - **Contract Group**: 
   - **Biennium Fiscal Year 1 Amount**: 1,617,000,000
   - **Biennium Fiscal Year 2 Amount**: 1,676,000,000
Step-by-Step Instructions for Completing EITC Analyst Review

Navigate to the **Negotiated Terms** tab to continue reviewing the contract details.

Navigate to the **Documents** tab and review any applicable contract documents.
Step-by-Step Instructions for Completing EITC Analyst Review

a) Navigate to the Workflow tab.

b) To review a previously submitted comment, hover over and click on a Speech Bubble (💬) icon in the Approval History.

c) Click EITC Analyst Approval.

Enter a summary of your review and any applicable comments in the Reason field and then click Confirm.
Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of *EITC Analyst Supervisor* to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the **Object** name.

Review the details of the contract on the Header tab.

**State Contract Number**
92-002290

**Name**
American Association of Motor Vehicle Administrators

**Contracting Entity**
DP5-Dept of Public Safety

**Supplier**
AMERICAN ASSOCIATION OF MOTOR

**Minimum Contract Purchase Amount**
3293000.00

**Market Type**
OPEN: Open Market

**Sourcing Project**

**Public Comments**
Processing FY22 & FY23 Biennium Contract #92-002290 - Renewal Controlling Board Shell Number DPS0100674- Subscription Services with Supplier (AAMVA) to continue services to access "Commercial Drivers License Information System" - "SSN Verification" - "US Passport Verification Services," etc. These amounts requested include a 5% contingency for (approximate) increases in costs related to possible transactions volume changes over the next biennium" (Verbiage included "CB DOC" in Explanation of Request Section). Please see "AAMVA Cost Summary" attached.

**Pre Governance Contract**

**On Hold**

**Biennium Fiscal Year 1**
2022 - State of Ohio

**Biennium Fiscal Year 1 Amount**
1,617,000,000

**Biennium Fiscal Year 2**
2023 - State of Ohio

**Biennium Fiscal Year 2 Amount**
1,676,000,000
Step-by-Step Instructions for Completing EITC Analyst Supervisor Review

Navigate to the **Negotiated Terms** tab to continue to reviewing the contract details.

Navigate to the **Documents** tab and review any applicable contract documents.
Step-by-Step Instructions for Completing EITC Analyst Supervisor Review

a) Navigate to the Workflow tab.
b) To review a previously submitted comment, hover over and click on a Speech Bubble (💬) icon in the Approval History.
c) Click Approve.

Enter a summary of your review and any applicable comments in the Reason field and then click Confirm.
Step-by-Step Instructions for Completing DAS DCPO Review

1. Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the Object hyperlink for any tasks that have an Action of DAS DCPO to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the Object name.

   ![My pending validations screenshot]

2. Review the details of the contract on the Header tab.

   ![Contract detail screenshot]

   - **State Contract Number**: 92-002290
   - **Name**: American Association of Motor Vehicle Administrators
   - **Contracting Entity**: DPS-Dept of Public Safety
   - **Supplier**: AMERICAN ASSOCIATION OF MOTOR
   - **Minimum Contract Purchase Amount**: 3293000.00
   - **Market Type**: OPEN: Open Market
   - **Sourcing Project**: 
   - **Public Comments**: Processing FY22 & FY23 Biennium Contract #92-002290 - Renewal Controlling Board Shell Number DPS0100874 - Subscription Services with Supplier (AAMVA) to continue services to access "Commercial Drivers License Information System" - "SSN Verification" - "US Passport Verification Services," etc. "These amounts requested include a 5% contingency for (approximate) increases in costs related to possible transactions volume changes over the next biennium." (Note: Included "CB DOC" in Explanation of Request Section). Please see "AAMVA Cost Summary" attached.
   - **Pre Governance Contract**: 
   - **On Hold**: 
   - **Biennium Fiscal Year 1**: 2022 - State of Ohio
   - **Biennium Fiscal Year 1 Amount**: 1,617,000,000
   - **Biennium Fiscal Year 2**: 2023 - State of Ohio
   - **Biennium Fiscal Year 2 Amount**: 1,676,000,000

Create a R&P for an Agency-Administered IT Contract
Step-by-Step Instructions for Completing DAS DCPO Review

Navigate to the **Negotiated Terms** tab to continue to reviewing the contract details.

Navigate to the **Documents** tab and review any applicable contract documents.
Step-by-Step Instructions for Completing DAS DCPO Review

a) Navigate to the Workflow tab.
b) To review a previously submitted comment, hover over and click on a Speech Bubble (💬) icon in the Approval History.
c) Click Approve.
Step-by-Step Instructions for Completing State CIO, DAS CPO, or DAS Director Review

1. Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the Object hyperlink for any tasks that have an Action of State CIO, DAS CPO, or DAS Director Review to quickly view and take action on any contracts requiring your action. Once you have found the task you would like to open, click on the Object name.

2. Review the details of the contract on the Header tab.

- **State CIO and DAS CPO review is required if the contract’s not exceed amount is greater than $500,000.**
- **DAS Director review is required if the contract’s not exceed amount is greater than $5,000,000.**
Navigate to the **Negotiated Terms** tab to continue to reviewing the contract details.

Navigate to the **Documents** tab and review any applicable contract documents.
Step-by-Step Instructions for Completing State CIO, DAS CPO, or DAS Director Review

a) Navigate to the **Workflow** tab.
b) To review a previously submitted comment, hover over and click on a **Speech Bubble (💬)** icon in the Approval History.
c) Click **Approve**.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).