

## Step-by-Step Instructions for Reviewing Release and Permit Information

To review the release and permit information associated with a purchase requisition (PR), navigate to the PR and open the **Release & Permit** tab.

 Release & Permit

**Release & Permit**

**A** **R&P Main Parameters**

R&P Type	Sub-Type	Characteristic	IT Exempt	DAS Exempt by BU	DAS Exempt by Account
IT	Non-Pre-Governance	Not-Enterprise	Not Exempt	Not Exempt by BU	Not Exempt by Account

1 Result(s) 

**B** **R&P Associated to this Purchase Requisition**

1	2	3	4	5	6	7	8	9	10	11	12	13	
Purchase Order	Purchase Requisition	Description	Item ID	Agency	Release & Permit Type	State Contract Number	Enterprise	ID	R&P Amount	Contract	IT	R&P	Business Unit
	IT Demonstration >\$25000	Order: 4932 - Ag.: DOH- Dept of Health - Sup.: HP INC	New desktops	DOH- Dept of Health	Standard		<input type="checkbox"/>	454	26,400.00		<input checked="" type="checkbox"/>	DOH01 - IT - 31	Dept of Health

1 Result(s) 

**A** **R&P Main Parameters:** Covers the type of release and permit that applies to the items in the purchase requisition, including whether it is an IT or Non-IT release and permit, and any exemptions that may apply.

**R&P Associated to this Purchase Requisition:** Contains specific information about any release and permit(s) that have been assigned to a purchase requisition, including:

- B**
- 1) Purchase Order/Purchase:** Notes any purchase orders (POs) and purchase requisitions (PRs) associated with an R&P. Note in this example that the purchase requisition has not been fully approved into a purchase order
  - 2) Description of the R&P**
  - 3) Item ID:** Name of the item covered in the R&P (if not blanket)
  - 4) Agency:** Notes any agency associated with an R&P
  - 5) Release & Permit Type:** Indicates whether an R&P is a Blanket, Pre-Governed, or Standard R&P
  - 6) State Contract Number:** If the R&P is tied to a specific State contract, its number will be listed here
  - 7) Enterprise:** This box will be checked for an Enterprise R&P
  - 8) ID:** The unique system ID of the R&P
  - 9) R&P Amount:** The amount covered by the R&P
  - 10) Contract:** If the R&P is tied to a specific contract, the contract name will be listed here
  - 11) IT:** This box will be checked for an IT R&P
  - 12) R&P:** The Release and Permit number that will be sent to OAKS
  - 13) Business Unit:** : If the R&P is tied to a specific Business Unit, it will be listed here

## Step-by-Step Instructions for Reviewing Release and Permit Information

Key benefits of R&Ps in Ohio|Buys:

- When a purchase requisition (PR) has received the proper approvals and requires a R&P, a R&P number will be automatically assigned to it.
- R&Ps can apply to IT, or non-IT purchases; however, please note that PRs should not combine items that require both IT and non-IT R&Ps.
- After receiving an R&P or subsequent Controlling Board number for a PR they can be added at the line item level from the associated drop-down menus.

### Pre-Governed IT Release and Permit

For reference, a pre-governed contract is an IT contract that has already been reviewed and approved by OIT, indicating that the contract meets all of the State's IT policies and standards. Pre-governed contracts will bypass the IT R&P workflow, but will still receive an IT R&P.

- 1) If an agency has an existing R&P for a pre-governed contract, the workflow will populate the existing number on the PR line item that is referencing the contract. Note that the population happens after Requisitioner, Procurement and Fiscal Approvers have reviewed the requisition.
- 2) If a purchase requisition is above the R&P amount, an amendment will need to be made on the contract to increase the not to exceed amount of the contract and the value of the R&P.
- 3) The Supplier that is populated in the R&P table will be the Supplier from the pre-governed contract.
- 4) The Contract Name that is populated in the R&P table will be the Contract Name from the pre-governed contract.
- 5) The R&P Expiration date will be the actual end date of the pre-governed contract; however, if the actual end date is empty, the R&P expiration date will be the original end date.

### IT Release and Permit

- 1) For IT purchases below \$25,000, the PR workflow will automatically assign your agency's Blanket R&P number. Each agency's Blanket R&P will be entered in Ohio|Buys for the assigned agency. There will be unlimited use of the blanket, and its value will be \$999,999,999.00. When an agency purchase is below \$25k, the purchase request will automatically utilize the Blanket R&P. If your PR contains line items with governance commodity codes, it will go through IT Strategic Investment Management (SIM) review prior to being assigned its blanket R&P number.
- 2) For IT purchases greater than \$25,000, the PR workflow will automatically assign an R&P after the PR has gone through a full IT approval. The R&P Amount will equal the total of the approved PO (sum of the line items per contract or Supplier).

## Step-by-Step Instructions for Reviewing Release and Permit Information

### Standard Non-IT Release and Permit

For non-IT purchases requiring a R&P, an R&P will be assigned for you after DAS Procurement has completed its review. Non-IT R&P's will be required for any purchase requisition where the cost of the line items exceeds \$49,999.99 for a single Supplier, and will be routed to DAS Procurement for review. The R&P amount will be the total amount of the approved PR (sum of lines per contract or Supplier).

### Blanket Non-IT Release and Permit

If you are using a DAS exempt account code that has been granted a blanket waiver on a purchase, Ohio|Buys will auto assign a Non-IT blanket R&P and bypass the DAS review step.

▲ For DAS solicitation when using a blanket code, you can fill out the request for solicitation form that can be accessed from the Sourcing tab, or within the purchase requisition.