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

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

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

1. **Purchase Order/Purchase**: Notes any purchase orders (POs) and PRs associated with an R&P. Note in this example that the PR has not been fully approved into a PO.
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 R&P 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.
Key benefits of R&Ps in Ohio|Buys:

- When a 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 PR 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).

**DAS Exempt Purchases**

When a PR contains an account code that is DAS exempt, Ohio|Buys will not apply a R&P and the purchase will route to the DAS Released Requisition step of the workflow.
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).

To streamline the approval process, agencies can receive a non-IT R&P for a qualifying purchase as part of the Request to Purchase (RTP) process. State agencies using Ohio|Buys to create PR can submit a RTP for purchases of products, supplies, and/or services are potentially valued at $50,000 or more; and do not reference a contract established by OPS.

**Linking a Release and Permit Number to a Purchase Requisition**

Agency users should not manually link a R&P number to their PR, unless:

1. The agency previously received a non-IT R&P for the purchase as part of the Request to Purchase (RTP) process.
2. The agency is referencing their non-IT Blanket R&P.
3. An IT Blanket R&P has already been manually created via the user interface for the agency (typically for staff augmentation purchases).
4. The agency is purchasing from an Agency Administered Contract that resulted in an IT R&P being created and linked to the contract.

If an agency user needs to manually link a R&P number to their PR, they should click the Pencil icon for the PR line item(s), expand the Release & Permit section, select if the R&P is an IT or non-IT R&P, and then select the associated R&P in the Release & Permit field. Please note, you may need to click See All in the Release & Permit field and search by the associated Supplier's name to find the correct R&P.

If an agency Requisitioner or Agency Procurement Approver does not link a previously created R&P number for any of the previously mentioned scenarios, the PR will route for DAS review (as applicable) before a R&P is automatically assigned.

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).