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Revised By:	Joshua Graves	**Review Cycle/Date:**	Annual
Reviewed By:	Fonda Logston	**Reviewing Unit:**	Enterprise Programs
Title:	Proposal for Services SOP		
Description:	This document is the operating standard for the proposal for services process.		

Proposal for Services

Standard Operating Procedure

1. General Statement of Purpose
   1.1. The purpose of this document is to identify the Proposal for Services process.
2. Scope
   2.1. This document applies to all agency requests for OMES IS services, solutions or products, which result in a recurring or one-time cost, except for Phone Services. Phone Services are approved and billed through the CRM Tool.
3. Discipline
   3.1. Administrative Standards
4. Terms and Definitions
   4.1. Quote – A proposal to a customer containing any one-time and monthly charges.
   4.2. Statement of Work (SOW) – A document which defines activities, deliverables and their respective timelines, all of which form a contractual obligation in providing services to the customer.
   4.3. Billing Change Order – A form used to change the billing of a customer that receives services from OMES IS.
5. Instructions
   5.1. When an agency requests new services, solutions or products, a Program Manager, Account Executive, IT Strategist or Service Owner sizes the scope of the request to be able to build a Quote.
   5.2. There are two documents used for proposing services to customers, a **Quote** and a **Statement of Work (SOW)**. A Quote is mandatory for each proposal; an SOW is used in conjunction with a Quote when line items cannot sufficiently describe the services performed.
   5.3. The Program Manager, Account Executive, IT Strategist or Service Owner drafts the Quote, and if necessary, the SOW.
      5.3.1. The Quote Template is located at: http://eclipse.omes.ok.gov/ISD/guidances/reusableassets/resources/Quote_Template.dotx
      5.3.2. The Statement of Work Template is located in the OMES IS Process Library at: http://eclipse.omes.ok.gov/ISD/guidances/reusableassets/resources/Statement_of_Work_Template.dotx
   5.4. The Program Manager, Account Executive, IT Strategist or Service Owner creates a SOW Request in the PPM Tool and attaches the Quote and SOW (if applicable). If the cost is over $15,000, the request must include a Project Number.

5.5. The Account Executive reviews the Quote and SOW to ensure:
- The quoted prices are in line with the Service Catalog.
- The recurring costs are included.
- The template language has not changed.

5.6. When the Account Executive assesses that the documents are satisfactory, they approve them in the PPM Tool, sending them to IS Finance. IS Finance reviews the documents to ensure the billing information is correct and approves them to go to the agency.

5.7. On the SOW, if the standard legal language deviates from the template, the Account Executive will submit it to OMES Legal by creating a Legal Review request in the PPM Tool and attaching the updated SOW. OMES Legal must approve any deviations to the SOW's standard legal language before it is sent to the customer.

5.8. After the Quote and SOW have been approved by IS Finance and OMES Legal (if necessary), the Account Executive, IT Strategist, Program Manager or Service Owner presents them to the requesting agency's leadership for a signature and a Purchase Order (PO).

5.9. Once the customer agrees to the terms stipulated in the Quote and SOW, they will sign both documents and return to the sender.

5.9.1. The customer and the Project Manager/Service Owner/Account Executive/IT Strategist may go back and forth deliberating on the stipulations in the Quote and/or SOW.

5.9.2. Both the Quote and SOW must be signed by a person designated on the Master Service Agreement (MSA). If that person is no longer with the agency, then either the Agency Director or an authorized designee must sign the documents.

5.9.2.1. Designees must be authorized in writing by the Agency Director with a memo. This memo is scanned and saved in the agency's Customer Service folder. These designations are only good during the fiscal year they are written and must be updated each fiscal year in the MSA.

5.10. The Service Owner, Program Manager, Account Executive or IT Strategist will sign the Quote and SOW, upload the signed copies to the PPM Tool and return a copy to the customer to await a PO.

5.11. When the Project Manager, Service Owner, IT Strategist or Account Executive receives a PO from the customer, they must upload it to the PPM Tool and approve the request to begin work.

5.12. Any services involving internal labor must be tracked and billed against an approved project, with a PeopleSoft Project ID code, on a monthly basis.

5.12.1. On a monthly basis, PMO Support creates a Billing Change Order by running a report in PeopleSoft to generate the number of hours logged against the PeopleSoft Project ID for the given month.

5.12.1.1. PMO Support logs into PeopleSoft's Employee Self Service Reporting Tool and runs the following report using the PeopleSoft Project ID: **GO_TL_REPORT_HOURS_BY_PROJECT**

5.12.2. PMO Support uploads the report to the PPM Tool and creates a CRM Case to have IS-Billing process the billing to the agency.

5.13. Once the work is complete, or on an interim basis for vendor services, the Project Manager, Service Owner, Account Executive or IT Strategist initiates billing.

5.13.1. If the customer is to be billed for vendor services, the invoice is routed through Accounts Payable and input into the PPM Tool. The Service Team Director delegates the approval of the invoice to the Project Manager/Service Owner/Account Executive/IT Strategist within the PPM Tool Invoice Request type. The delegated approver must designate the request as a pass thru by selecting **Yes** in the Pass Thru field and entering the agency number in the Pass Thru To field. This enables the agency to be automatically billed for the vendor invoice.

5.13.2. These steps are for when a Billing Change Order must be created.

5.13.2.1. The Project Manager/Service Owner/Account Executive/IT Strategist accesses the Billing Change Order Template from the OMES IS Process Library (http://eclipse.omes.ok.gov/) under the Service Owner Role.

5.13.2.2. The **Billing CO** tab has the template on it. When the gray boxes are filled, the blue boxes will automatically update to generate a Billing Change Order.

5.13.2.3. The **Products** tab has the part numbers.

5.13.2.4. The Project Manager/ Service Owner/Account Executive/IT Strategist creates a CRM Case to have IS-Billing bill the customer. The Billing Change Order, Quote and PO should be attached to the CRM Case.

5.14. Once the billing for work performed has been processed, the Account Executive processes any needed changes to the agency's MSA for recurring monthly billing and gets the agency's signature on the updated MSA.

6. Roles and Responsibilities

6.1. Customer

6.1.1. Signs the Quote and SOW and returns them to the Project Manager or Service Owner.

6.1.2. Submits a Purchase Order for services.

6.2. Project Manager, Service Owner, Account Executive or IT Strategist

6.2.1. Sizes the scope of the request to be able to build a Quote.

6.2.2. Drafts the Quote, and if necessary, the Statement of Work.

6.2.3. Creates a SOW Request in the PPM Tool and uploads the Quote and SOW.

6.2.4. Presents the Quote and SOW to the requesting agency's leadership.

6.2.5. Signs the Quote and SOW after the customer has signed them.

6.2.6. Uploads signed Quote, SOW and PO to the PPM Tool.

6.2.7. Designates the request as a pass thru in the PPM Tool.

6.2.8. Creates a Billing Change Order once the work is complete or on an interim basis for vendor services.

6.2.9. Creates a CRM Case to have IS-Billing bill the customer.

6.2.10. Completes the SOW Request in the PPM Tool once billing is complete so the Account Executive can process any needed changes to the agency's MSA.

6.2.11. Uploads the Billing Change Code to the PPM Tool.

6.3. PMO Support

6.3.1. Creates a monthly Billing Change Order for internal labor by running a report in PeopleSoft to generate the number of hours logged against the PeopleSoft Project ID for the given month.

6.3.2. Creates a CRM Case for IS-Billing to process the billing to the agency.

6.4. Account Executive

6.4.1. Reviews the Quote and SOW and sends them to IS Finance.

6.4.2. Sends SOWs that deviate from the template for Legal Review using the PPM Tool.

6.4.3. Processes any needed changes to the agency's MSA for recurring monthly billing.

6.5. IS Finance

6.5.1. Reviews the documents to ensure the billing information is correct.

6.6. OMES Legal

6.6.1. Reviews SOWs that deviate from the approved template using the PPM Tool.

6.7. OMES IS Billing

6.7.1. Processes billing to the agency.

7. References

7.1. Agency folder – **J: < Function < Customer Service**

7.2. PMO Support's Billing folder – **J: < Function < PMO < PMO Admin < Billing**

7.3. Employee Self Service Reporting Tool report – **GO_TL_REPORT_HOURS_BY_PROJECT**

7.4. Billing Change Order Template – http://eclipse.omes.ok.gov/ under the Service Owner role

7.5. Quote Template – http://eclipse.omes.ok.gov/ISD/guidances/reusableassets/resources/Quote_Template.dotx

7.6. Statement of Work Template – http://eclipse.omes.ok.gov/ISD/guidances/reusableassets/resources/Statement_of_Work_Template.dotx