

COORDINATED CARE SERVICES, INC.

2010 AUTHORIZATION FOR PURCHASE OF EQUIPMENT GREATER THAN \$5,000

NYS OFFICE OF ALCOHOL AND SUBSTANCE ABUSE SERVICES
NYS OFFICE OF MENTAL RETARDATION & DEVELOPMENTAL DISABILITIES
NYS OFFICE OF MENTAL HEALTH

5 WRITTEN BIDS NECESSARY

AGENCY: _____

EQUIPMENT BEING PURCHASED:

Table with 4 columns: DESCRIPTION, QUANTITY, UNIT COST, EXTENDED COST. Contains three empty rows for data entry.

(ATTACH QUOTES & DESCRIPTIVE MATERIAL)

JUSTIFICATION OF PURCHASE EXPLAINING WHY THESE FUNDS ARE BEING USED:

Three horizontal lines for providing justification of purchase.

AGENCY FINANCIAL APPROVAL:

HAS COST BEEN INCLUDED IN THE AGENCY BUDGET? YES ____ NO ____

WHAT PROGRAM IS THE EXPENSE CHARGED TO? _____

PROGRAM CODE PER CFR MANUAL? _____

WHAT 3 DIGIT FUNDING CODE IS BEING USED PER CFR MANUAL? _____

FUNDING DESCRIPTION CODE? _____

OMH OASAS OMRDD (Please check)

APPROVED BY _____ DATE _____
AGENCY DIRECTOR

APPROVED BY _____ DATE _____
COORDINATED CARE SERVICES, INC.

APPROVED BY _____ DATE _____
MONROE COUNTY OFFICE OF MENTAL HEALTH

APPROVED BY _____ DATE _____
NEW YORK STATE __OMH __OASAS __OMRDD

Requirements

The minimum requirements agencies must observe when purchasing equipment, furniture and furnishings are as follows:

- Purchases *up to \$2,500* are reasonable and necessary
- Purchases of *\$2,501 to \$5,000*: will not require prior written approval. The Agency will be required to obtain telephone bids and select the lowest bid. Each bid must be standardized with set specifications. Written justification must be maintained if the lowest bid is not selected as evidence of this decision.
- Purchases in excess of *\$5,000*: Prior written approval is required from CCSI and Monroe County; with a good faith effort to obtain five (5) written bids. Each bid must be standardized with set specifications. Written justification must be provided if the lowest bid is not selected. The bids should accompany the Authorization form. Note: If agencies are purchasing equipment via a NYS Contract Agency, then only one bid is necessary. Please refer to the following link for State Contract information: <http://www.ogs.state.ny.us/>. When submitting an equipment request with a NYS Contract Agency bid, please incorporate the NYS contract number, along with any other applicable back-up detail.

Fiscal accountability and reporting must comply with State aid Consolidated Fiscal Reporting system (CFR)

Procedure:

CCSI will:

- review authorization requests for accuracy, completeness and bid disclosure;
- notify agencies if additional information is required;
- submit authorization requests for County and state approval;
- maintain a tracking system for all requests; and
- advise agencies of the final determination.

Additional OASAS Requirements:

Purchases of equipment shall follow the same guidelines as written above. In addition, all MIS-related expenses must be approved, in writing, by the NYS OASAS Field Office, Monroe County and CCSI prior to incurring such expense, even though the item(s) and/or funding is a part of the budget approved by the state, county and CCSI. Also, the Agency must submit multi-year plans for all MIS-related equipment purchases to NYS OASAS in the form of a Technology Plan with a courtesy copy to CCSI on behalf of Monroe County. This plan must be approved by NYS OASAS prior to requesting written approval to incur such expense.

Forms and bid backup should be mailed to:

Mr. Dan Wright
Sr. Financial Analyst
Coordinated Care Services, Inc.
1099 Jay St., Bldg J
Rochester, New York 14611