



State of Ohio - Office of Budget and Management
30 East Broad Street - Columbus, Ohio 43266-0411

March 20, 2001

MEMORANDUM TO: Fiscal Officers of All State Agencies

FROM: David L. White
Deputy Director
State Accounting

A handwritten signature in blue ink, appearing to read 'DLW', is placed over the printed name of David L. White.

SUBJECT: Set-Aside Purchase Orders for Fiscal Year 2001

A number of agencies have contacted State Accounting after noticing that some purchase orders that they had marked as Minority Business Enterprise (MBE) set-asides were not recorded in CAS as set-aside purchases. We believe that we have corrected the problem that caused the intermittent removal of the set-aside flag, but unfortunately, we are unable to identify the individual purchase orders that were affected while the problem existed.

If your agency had purchase orders affected by the set-aside flag removal problem, then you may restore the flag using the MBE Set-Aside Documents master table in CAS. To assist you in this process, we have provided the enclosed report Purchases Eligible for Set-Aside but Not Flagged, which shows FY 2001 purchase orders (ORDE only) that meet all of these criteria:

- The vendor is marked as an MBE on the CAS vendor file.
- The ORD does not appear as set-aside on CAS inquiry QSPND04.
- The ORD does not appear with a set-aside flag on SASD.

These criteria are designed to exclude from the special report any ORDs that are ineligible for set-aside flagging because they are not against an MBE vendor. The report also excludes ORDs that are eligible for set-aside flagging if they have already been successfully flagged. **Therefore, if an ORDE appears on this report, it is eligible for MBE set-aside flagging and is not currently flagged.** Once you have reviewed this report and identified any ORDs that need to be retroactively flagged, you should enter these documents on the SASD master table in CAS.

Procedures for On-Line Agencies

Agencies with CAS access will use the MBE Set-Aside Documents master table to enter the document numbers of those previously entered ORDs that were not but should have been flagged as MBE set-aside purchases. Step-by-step instructions for updating the SASD table are attached to this memo. If you have questions about SASD, please contact Mame Greulich at mame.greulich@obm.state.oh.us or 614-466-3600.

Your agency already has the CAS security necessary to update the SASD table if you previously updated the SASD table or if you currently update **any** CAS master tables, such as Responsibility Center (RC), Pseudo Code (PCDP), Location (LOC), Electronic Commerce Contact Person (ECCP), or any agency-specific special edit tables. If your agency does not update any CAS master tables, then you will need to establish entry ability for at least one CAS user within your agency in order to update the SASD table. To do so, complete an application for CAS security (available from State Accounting) and write **SASD** in the AGMT column on the application to enable your user to update the SASD table. When updating a user's security, please remember to show all CAS functions for which the user should be authorized.

Procedures for Off-Line Agencies

Agencies without access to CAS can request retroactive ORD flagging assistance from the State Accounting Help Desk at helpdesk@obm.state.oh.us or 614-466-3993.

Attachments