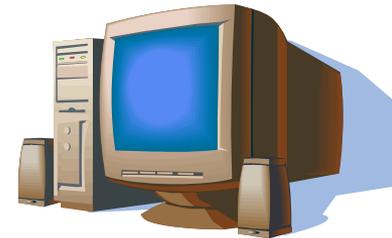


# Procurement Communications Reporting System

PCRS



# Procurement Communications Reporting References

The following information and links should be helpful to you. I am sure they will become your favorites.

## 1. EIU website for Procurement Communications Reporting information:

<http://www.eiu.edu/ethics/ethicsprocurementreporting.php>

At this website, you will find:

- 1) General information
- 2) Link to reporting website
- 3) Savable worksheet to begin reporting notes
- 4) Link to PowerPoint for EIU
- 5) Link to Frequently Asked Questions

## 2. Procurement Policy Board Website:

<http://www2.illinois.gov/PPB/Pages/procurement-communications-reporting.aspx>

At this website, you will find:

- 1) Link to reporting website
- 2) General Public link to review published reports
- 3) Link to Frequently Asked Questions
- 4) EEC Rules
- 5) Training module Power Point from the State
- 6) Text of the law

# Reporting Worksheet

- This savable worksheet is available on the EIU website. I recommend you use it to draft your report. You can then copy and paste from the worksheet and save a copy for your records. Note the worksheet includes:
  - A statement you can read to vendors.
  - A link to the reporting website.

# Procurement Reform Legislation Amended the Procurement Code

Sec. 50-39. Procurement communications reporting requirement.

(a) Any written or oral communication received by a State employee that imparts or requests material information or makes a material argument regarding potential action concerning a procurement matter, including, but not limited to, an application, a contract, or a project, shall be reported to the Procurement Policy Board. These communications do not include the following: (i) statements by a person publicly made in a public forum; (ii) statements regarding matters of procedure and practice, such as format, the number of copies required, the manner of filing, and the status of a matter; and (iii) statements made by a State employee of the agency to the agency head or other employees of that agency or to the employees of the Executive Ethics Commission. The provisions of this Section shall not apply to communications regarding the administration and implementation of an existing contract, except communications regarding change orders or the renewal or extension of a contract.

# Procurement Reform Legislation

## Amended the Procurement Code (continued)

Sec. 50-39. Procurement communications reporting requirement. (continued)

(b) The report required by subsection (a) shall be submitted monthly and include at least the following: (i) the date and time of each communication; (ii) the identity of each person from whom the written or oral communication was received, the individual or entity represented by that person, and any action the person requested or recommended; (iii) the identity and job title of the person to whom each communication was made; (iv) if a response is made, the identity and job title of the person making each response; (v) a detailed summary of the points made by each person involved in the communication; (vi) the duration of the communication; (vii) the location or locations of all persons involved in the communication and, if the communication occurred by telephone, the telephone numbers for the callers and recipients of the communication; and (viii) any other pertinent information.

# Procurement Reform Legislation

## Amended the Procurement Code (Continued)

Sec. 50-39. Procurement communications reporting requirement. (continued)

(c) Additionally, when an oral communication made by a person required to register under the Lobbyist Registration Act is received by a State employee that is covered under this Section, all individuals who initiate or participate in the oral communication shall submit a written report to that State employee that memorializes the communication and includes, but is not limited to, the items listed in subsection (b).

(d) The Procurement Policy Board shall make each report submitted pursuant to this Section available on its website within 7 days after its receipt of the report. The Procurement Policy Board may promulgate rules to ensure compliance with this Section.

(e) The reporting requirements shall also be conveyed through ethics training under the State Employees and Officials Ethics Act. An employee who knowingly and intentionally violates this Section shall be subject to suspension or discharge. The Executive Ethics Commission shall promulgate rules, including emergency rules, to implement this Section.

(f) This Section becomes operative on January 1, 2011.

# What is required to be reported?

A communication that imparts or requests material information or makes a material argument is a communication that a reasonable person would believe was made for the purpose of influencing a procurement decision presently under consideration or to be considered in the near future. Such decisions include, but are not limited to, decisions:

1. establishing or defining a procurement need or method of source selection;
2. drafting, reviewing, or preparing specifications, plans or requirements;
3. drafting, reviewing, or preparing any invitations for bid, requests for proposals, requests for information, sole source procurement justifications, emergency procurement justifications, or selection information;
4. evaluating bids, responses, offers;
5. publishing notices to the Procurement Bulletins;



# What is required to be reported (cont.)?

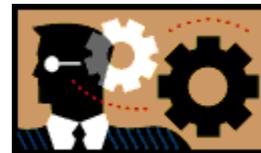
6. letting or awarding a contract;
7. determining the contents of the procurement file or the contract file;
8. resolving protests;
9. determining inclusion on prequalification lists or prequalification in general;
10. identifying potential conflicts of interests or the voiding or allowing a contract, bid offer, or subcontract for a conflict of interest;
11. voiding or allowing a contract or subcontract pursuant to Section 50-50 of the Illinois Procurement Code;
12. determining firm performance evaluations;
13. determining suspensions or debarments; and
14. approving change orders or the renewal or extension of an existing contract

# What is NOT required to be reported?

1. communications made by a person publicly made in a public forum;
2. communications regarding matters of procedure and practice, such as format, the number of copies required, the manner of filing, and the status of a matter;
3. communications made by a State employee of the agency to the agency head or other employees of that agency or to the employees of the Executive Ethics Commission;
4. communications regarding the administration and implementation of an existing contract, *except communications regarding change orders or the renewal or extension of an existing contract*; and
5. unsolicited communications providing general information about products, services, or industry best practices that are not further disseminated, considered, or used by the receiving employee or any person in a procurement decision.

# Who can assist me in making a determination to report?

- Ultimately the individual State employee or officer is ethically charged to decide if a communication should be reported.
- Your agency/university Ethics Officer is available to assist you.



# When should I report the communication?

Upon receipt of a communication, the State officer or employee shall report the communication to the Procurement Policy Board.



# What does the Procurement Policy Board do with my communications reports?

Your communications are electronically reported to the Procurement Policy Board (PPB) and are then automatically published to the PPB website in a searchable and sortable database that is available to the public.



# How do I report my communications?

Your communications are reported to the PPB using an internet application created specifically for that purpose.

<http://pcrs.illinois.gov>

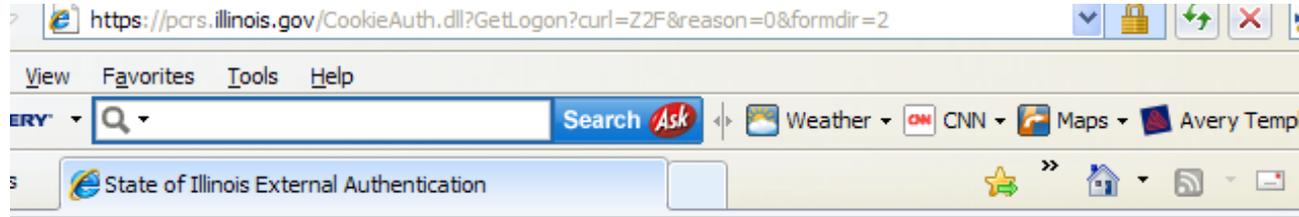


# What happens to my communication report after I submit it?

Your communications reports are submitted to your agency or university State Purchasing Officer (SPO) for review.

- This is NOT an approval – the SPO is not empowered to overturn your decision to report a communication – YOU are ethically charged with making the report.
- The SPO may only reject your report for malicious content. If a report is rejected, it will be automatically turned over by the Procurement Policy Board to the Office of the Executive Inspector General for investigation – *no exceptions*.
- Once reviewed for content, the SPO will submit it to the PPB.
- Communications reports are automatically forwarded to the Procurement Policy Board after 30 days (from date of employee submission) if no action is taken by the SPO.

# Training Tutorial



For our tutorial scenario, we received a phone call, and we need to document what transpired.

We open our browser (in this case, Internet Explorer), type the URL, and press the ENTER key. The following webpage appears:

We must choose the “Domain” that is appropriate for our “User Name”. Our selection will be “Other Employees”. We will not use “General Public”.

Since EIU employees do not already have an Illinois.gov ID, you must first obtain one by clicking on Sign up. The process of obtaining an Illinois.gov ID must be completed in 24 hours. Do not begin this process on Friday afternoon.

State of Illinois  
Web Authentication Portal

Security ( [show explanation](#) )

This is a public or shared computer

This is a private computer

**Warning:** By selecting this option you acknowledge that your Domain and User name will be stored in a cookie on your PC.

I want to change my password after logging on

**\*\*Warning! Unauthorized access is prohibited\*\***

Further access is limited to authorized users only. By accessing or using this system you are consenting to monitoring and recording, which may be disclosed for administrative, disciplinary, civil, or criminal actions, penalties, or prosecution. Users should have no expectation of privacy when accessing or using this system or any of its components.

Domain:

User name:

Password:

[Don't have an Illinois.gov ID?](#)

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Then click the Log On button.

After clicking the Log On button, the following Home screen is displayed:

To the left is a “navigation bar” which consists of hyperlinks that can allow movement through the application.

The [Contact Your Agency Ethics Officer](#) hyperlink can be clicked, and that will display a screen of agencies and their associated ethics officers.

The [Frequently Asked Questions](#) hyperlink will display a screen of questions and answers that might assist with some issues that might arise.

click the [Create a Communication Document](#) navigation bar hyperlink

### Communication Document Heading

Communication Identifier	
Communication Topic (Required)	
Communication Mode (Required)	Email
Author's Agency (Required)	AGE - Aging
Communication Date/Time (Required)	10/07/2010 14:05:03 PM
Duration in Minutes (Required)	
Agency Reference Number	

### Communication Document Text

Action Requested or Recommended (Required)	
Summary of Communication (Required)	
Additional Information	



Click the SAVE button to save the record for further updates.

Click the CANCEL button if you do not want to save any changes.

Most of the fields are simple text fields, though “Communication Mode” and “Author’s Agency” are drop-down lists that choices can be picked from. The “Communication Date” can be typed or a calendar picker will appear if the calendar icon is clicked. The “Communication Time” must be typed in with AM/PM being a drop-down list.

After some data is typed in, we can click either the Save or Cancel button:

### Communication Document Heading

Communication Identifier	
Communication Topic (Required)	Would I like a free copy of XYZ Software?
Communication Mode (Required)	Phone
Author's Agency (Required)	CMS - Central Management Services
Communication Date/Time (Required)	10/07/2010 14:00 PM
Duration in Minutes (Required)	2
Agency Reference Number	

### Communication Document Text

Action Requested or Recommended (Required)	Salesman called and offered a free copy of software that could be used for examination purposes.
Summary of Communication (Required)	I explained that I wasn't involved in that examination process. He indicated that I could have the software anyway, but I declined.
Additional Information	

**Save** **Cancel**

Click the SAVE button to save the record for further updates.

Click the CANCEL button if you do not want to save any changes.

The Save button saves the Communication Document to allow further editing and other actions on the Communication document.

The Cancel button simply does not save the data typed in, and will take us to the same screen as the Existing Documents navigation bar hyperlink.

If fact, all Cancel buttons throughout the system act exactly as expected: no modifications performed and returning to a previous state. Throughout the remaining instructions, understanding the Cancel button operation is assumed.

Click Save

## This screen that allows further editing and other actions:

The Edit Heading/Text button takes us back to the screen where we created the Communication Document to allow modification of any of those fields.

The Edit Participants button displays a screen to modify the list of participants involved in the communication. Every Communication Document must have one, and only one, "initiator" (the one who started the communication), one, and only one, "recipient" (the one who was initially contacted by the initiator) and possibly one or more "contributors" (other people involved in the communication).

The Submit button indicates that the Communication Document has been completed, and that it is ready to be viewed by the public in the form created. Various checks will be performed to make certain the Communication Document meets the requirements; errors will be displayed at the top of the screen in red.

### View Communication Document

Home > Existing Documents > View Communication Document

#### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

#### Communication Document Text

Action Requested or Recommended	Salesman called and offered a free copy of software that could be used for examination purposes.
Summary of Communication	I explained that I wasn't involved in that examination process. He indicated that I could have the software anyway, but I declined.
Additional Information	

#### Communication Document Participants

Name	Type	Role	Job Title	Representing	Location	Telephone	Email
Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois			

**Edit Heading/Text** Edit the textual information associated with this Communication Document.

**Edit Participants** Edit the participant list associated with this Communication Document.

**Submit** Submit this Communication Document to the review process.

**Delete** Delete this Communication Document.

**Existing Documents** Return to the Existing Documents page.

The Delete button will delete the Communication Document. The data will be retained for historical purposes; however, the Communication Document will not continue through the process to become viewable by the public

Since we don't have enough participants, clicking Edit Participants, we'll see:

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### Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participants

#### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

#### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois			

Click the ADD PARTICIPANT button to add an additional Participant to the Communication Document.

Click the SAVE button to save the modifications made to the Participant data.

Click the CANCEL button if you do not want to save any of the changes made to the Participant data.

Each participant must have a “name”, “type”, “role”, “job title”, “representing” and “location” for all “communication modes”. In this case shown here, we have a “Phone” communication mode, so “telephone number” is also needed. If the communication mode was “Email”, the “email address” would be needed but the “telephone number” would not be.

The system automatically added the Communication Document's creator, and assumes that individual is a “State Employee” and the “Recipient” of the communication; however, the computer doesn't know such information as location, telephone number or email address.

We need to add our location, and in this case, telephone number, so clicking the Modify button next to our participant entry opens a separate panel for detail like this:

**Edit Communication Document Participants**

[Home](#) > [Existing Documents](#) > [View Communication Document](#) > [Edit Communication Document Participants](#)

### Communication Document Heading

Communication Identifier	<b>231</b>
Communication Topic	<b>Would I like a free copy of XYZ Software?</b>
Communication Mode	<b>Phone</b>
Author's Agency	<b>CMS - Central Management Services</b>
Communication Date/Time	<b>10/7/2010 4:00:00 PM</b>
Duration in Minutes	<b>2</b>
Agency Reference Number	

### Participant Detail

First Name (Required)	<input type="text" value="Gregory"/>
Last Name (Required)	<input type="text" value="Lovekamp"/>
Name Suffix (e.g., Sr., Jr., III)	<input type="text"/>
Participant Type (Required)	<input type="text" value="State Employee"/>
Participant Role (Required)	<input type="text" value="Recipient"/>
Job Title (Required)	<input type="text" value="Employee"/>
Representing (Required)	<input type="text" value="State of Illinois"/>
Location (Required)	<input type="text"/>
Telephone Number (Required)	<input type="text"/>
Email Address	<input type="text"/>

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois			

Notice each field that is required indicates such, and you will not be allowed to Update the participant unless all required fields have a value.

We simply type values for the “location”, “telephone number” (if needed), and “email address” (if needed).

**Edit Communication Document Participants**

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participant

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Participant Detail

First Name (Required)	Gregory
Last Name (Required)	Lovekamp
Name Suffix (e.g., Sr., Jr., III)	
Participant Type (Required)	State Employee ▼
Participant Role (Required)	Recipient ▼
Job Title (Required)	Employee
Representing (Required)	State of Illinois
Location (Required)	120 W Jefferson, Springfield, IL 62702
Telephone Number (Required)	217-557-6067
Email Address	

### Communication Participants

Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
------	------	------	-----------	--------------	----------	------------------	---------------

“Telephone Number” is edited and should allow any U.S. or international phone numbering scheme. U.S. formats are limited to “(217) 555-1212” or “217-555-1212”; such decorative styles as “217.555.1212” are not allowed.

“Email Address” is edited and will allow almost every email address. There must be an alphanumeric value, then “@” followed by some value, then a “.”, finally an extension. That final extension must be two to four characters in length. That will accommodate “.com”, “.net”, etc., and even “.us” and “.ca”. Something ending in “.museum” will fail, however. This limitation was placed because the likelihood of someone forgetting the “.net” is higher than needing a “.museum” address.

Click Update

## The new values are reflected in the “Communication Participants”:

### Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participants

#### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

#### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	

Click the ADD PARTICIPANT button to add an additional Participant to the Communication Document.

Click the SAVE button to save the modifications made to the Participant data.

Click the CANCEL button if you do not want to save any of the changes made to the Participant data.

Since all Communication Documents require both a recipient and an initiator, we need to add the initiator, so by clicking **Add Participant**:

We have a place to add details for another participant.

## Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participant

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Participant Detail

First Name (Required)	<input type="text"/>
Last Name (Required)	<input type="text"/>
Name Suffix (e.g., Sr., Jr., III)	<input type="text"/>
Participant Type (Required)	State Employee <input type="button" value="v"/>
Participant Role (Required)	Initiator <input type="button" value="v"/>
Job Title (Required)	<input type="text"/>
Representing (Required)	<input type="text"/>
Location (Required)	<input type="text"/>
Telephone Number (Required)	<input type="text"/>
Email Address	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	

Again, we fill in the data:

**Edit Communication Document Participants**

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participants

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Participant Detail

First Name (Required)	Fred
Last Name (Required)	Flintstone
Name Suffix (e.g., Sr., Jr., III)	
Participant Type (Required)	Vendor
Participant Role (Required)	Initiator
Job Title (Required)	Salesman
Representing (Required)	Slate Gravel Quarry
Location (Required)	Bedrock, USA
Telephone Number (Required)	435-555-1212
Email Address	

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	

When we click Update...

The Communication Participants are again updated.

## Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participants

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	

Click the ADD PARTICIPANT button to add an additional Participant to the Communication Document.

Click the SAVE button to save the modifications made to the Participant data.

Click the CANCEL button if you do not want to save any of the changes made to the Participant data.

We have seen the Add Participant button functionality. We can assume that by clicking Cancel, we will discard any changes we made to the participants.

Save will modify the Communication Document with our changes to participants.

Clicking Save brings us back to this screen:

## View Communication Document

Home ▶ Existing Documents ▶ View Communication Document

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Communication Document Text

Action Requested or Recommended	Salesman called and offered a free copy of software that could be used for examination purposes.
Summary of Communication	I explained that I wasn't involved in that examination process. He indicated that I could have the software anyway, but I declined.
Additional Information	

### Communication Document Participants

Name	Type	Role	Job Title	Representing	Location	Telephone	Email
Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	

<a href="#">Edit Heading/Text</a>	Edit the textual information associated with this Communication Document.
<a href="#">Edit Participants</a>	Edit the participant list associated with this Communication Document.
<a href="#">Submit</a>	Submit this Communication Document to the review process.
<a href="#">Delete</a>	Delete this Communication Document.
<a href="#">Existing Documents</a>	Return to the Existing Documents page.

We have not yet discussed the Existing Documents button which works exactly like the Existing Documents navigation bar hyperlink.

We referenced that screen earlier in this tutorial as well. Let's see what it looks like by clicking either the button or the hyperlink.

This is the Existing Documents screen:

The screenshot shows a web interface with a dark blue header bar containing the text "Existing Documents". In the top right corner, there is a breadcrumb trail: "Home > Existing Documents".

The first panel is titled "Communication Documents Needing Completed" and contains a table with the following data:

	Topic	Date/Time	Reference	Initiator	Representing
<a href="#">Details</a>	Would I like a free copy of XYZ Software?	10/7/2010 4:00 PM		Fred Flintstone	Slate Gravel Quarry

Below the table is a pagination control: "| < < Page 1 of 1 ( 1 records total ) > > |".

The second panel is titled "Communication Records Requiring Lobbyist Reports" and contains the text "You Have No Outstanding Lobbyist Reports". Below this is a pagination control: "| < < Page 0 of 0 ( 0 records total ) > > |".

The third panel is titled "Communication Documents Submitted Previously" and contains the text "You Have Created No Communication Documents". Below this is a pagination control: "| < < Page 0 of 0 ( 0 records total ) > > |".

The top panel displays Communication Documents that we have in process, and as you can see, the one we have just created is there.

The second panel shows Lobbyist Reports that we need to add to Communication Documents which we have previously submitted. We will come back to this in a bit.

The bottom panel contains Communication Documents that we created in the past. We'll see more about this in the future, as well.

For now, let's go back to the Communication Document we were working on by clicking **Details** next to that entry.

That option brought us back to our primary Communication Document screen:

**View Communication Document**

Home ▶ Existing Documents ▶ View Communication Document

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Communication Document Text

Action Requested or Recommended	Salesman called and offered a free copy of software that could be used for examination purposes.
Summary of Communication	I explained that I wasn't involved in that examination process. He indicated that I could have the software anyway, but I declined.
Additional Information	

### Communication Document Participants

Name	Type	Role	Job Title	Representing	Location	Telephone	Email
Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	

◀ ▶

<b>Edit Heading/Text</b>	Edit the textual information associated with this Communication Document.
<b>Edit Participants</b>	Edit the participant list associated with this Communication Document.
<b>Submit</b>	Submit this Communication Document to the review process.
<b>Delete</b>	Delete this Communication Document.

**Existing Documents** Return to the Existing Documents page.

To demonstrate the Lobbyist Report, we're going to say that our phone call had a registered lobbyist on the line with us. To add him, we must **Edit Participants**.

Once here, we need to **Add Participant**.

## Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participants

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	

Click the ADD PARTICIPANT button to add an additional Participant to the Communication Document.

Click the SAVE button to save the modifications made to the Participant data.

Click the CANCEL button if you do not want to save any of the changes made to the Participant data.

Now we need to add the data for our lobbyist.

### Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participant

#### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

#### Participant Detail

First Name (Required)	<input type="text"/>
Last Name (Required)	<input type="text"/>
Name Suffix (e.g., Sr., Jr., III)	<input type="text"/>
Participant Type (Required)	State Employee ▼
Participant Role (Required)	Initiator ▼
Job Title (Required)	<input type="text"/>
Representing (Required)	<input type="text"/>
Location (Required)	<input type="text"/>
Telephone Number (Required)	<input type="text"/>
Email Address	<input type="text"/>

#### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
<input type="button" value="Modify"/> <input type="button" value="Delete"/>	Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	

Notice the "Participant Type" of "Lobbyist".  
Click **Update**.

## Edit Communication Document Participants

[Home](#) ▶ [Existing Documents](#) ▶ [View Communication Document](#) ▶ [Edit Communication Document Participants](#)

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Participant Detail

First Name (Required)	Barney
Last Name (Required)	Rubble
Name Suffix (e.g., Sr., Jr., III)	
Participant Type (Required)	Lobbyist
Participant Role (Required)	Contributor
Job Title (Required)	Lobbyist
Representing (Required)	Bedrock Interests
Location (Required)	2387 Witch hazel Ln, Shale City, WA
Telephone Number (Required)	988-555-1212
Email Address	

**Update** [Cancel](#)

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<a href="#">Modify</a> <a href="#">Delete</a>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	

## Edit Communication Document Participants

Home ▶ Existing Documents ▶ View Communication Document ▶ Edit Communication Document Participants

### Communication Document Heading

Communication Identifier	231
Communication Topic	Would I like a free copy of XYZ Software?
Communication Mode	Phone
Author's Agency	CMS - Central Management Services
Communication Date/Time	10/7/2010 4:00:00 PM
Duration in Minutes	2
Agency Reference Number	

### Communication Participants

	Name	Type	Role	Job Title	Representing	Location	Telephone Number	Email Address
<a href="#">Modify</a> <a href="#">Delete</a>	Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
<a href="#">Modify</a> <a href="#">Delete</a>	Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	
<a href="#">Modify</a> <a href="#">Delete</a>	Barney Rubble	Lobbyist	Contributor	Lobbyist	Bedrock Interests	2387 Witchhazel Ln, Shale City, WA	988-555-1212	

Add Participant

Click the ADD PARTICIPANT button to add an additional Participant to the Communication Document.

Save

Click the SAVE button to save the modifications made to the Participant data.

Cancel

Click the CANCEL button if you do not want to save any of the changes made to the Participant data.

**Click Save.**

## Communication Document Heading

Communication Identifier	<b>231</b>
Communication Topic	<b>Would I like a free copy of XYZ Software?</b>
Communication Mode	<b>Phone</b>
Author's Agency	<b>CMS - Central Management Services</b>
Communication Date/Time	<b>10/7/2010 4:00:00 PM</b>
Duration in Minutes	<b>2</b>
Agency Reference Number	

## Communication Document Text

Action Requested or Recommended	<b>Salesman called and offered a free copy of software that could be used for examination purposes.</b>
Summary of Communication	<b>I explained that I wasn't involved in that examination process. He indicated that I could have the software anyway, but I declined.</b>
Additional Information	

## Communication Document Participants

Name	Type	Role	Job Title	Representing	Location	Telephone	Email
Gregory Lovekamp	State Employee	Recipient	Employee	State of Illinois	120 W Jefferson, Springfield, IL 62702	217-557-6067	
Fred Flintstone	Vendor	Initiator	Salesman	Slate Gravel Quarry	Bedrock, USA	435-555-1212	
Barney Rubble	Lobbyist	Contributor	Lobbyist	Bedrock Interests	2387 Witchhazel Ln, Shale City, WA	988-555-1212	

Edit Heading/Text

Edit the textual information associated with this Communication Document.

Edit Participants

Edit the participant list associated with this Communication Document.

Submit

Submit this Communication Document to the review process.

Delete

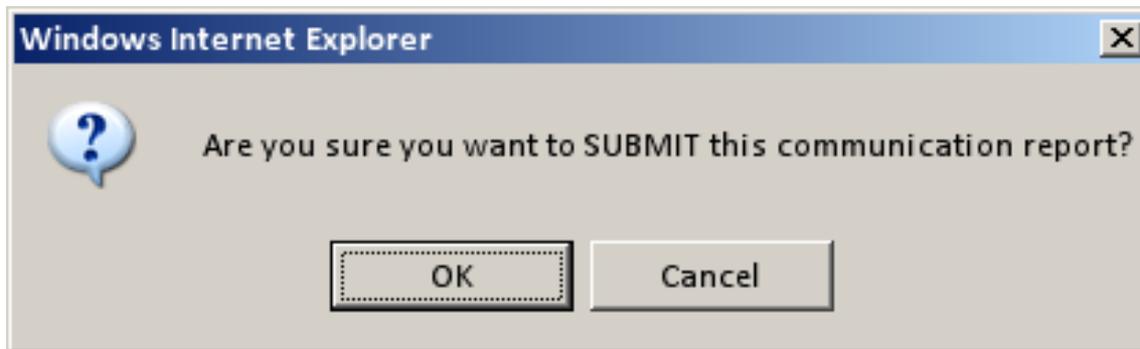
Delete this Communication Document.

Existing Documents

Return to the Existing Documents page.

OK, our Communication Document is complete. We click **Submit** to indicate we are done with it.

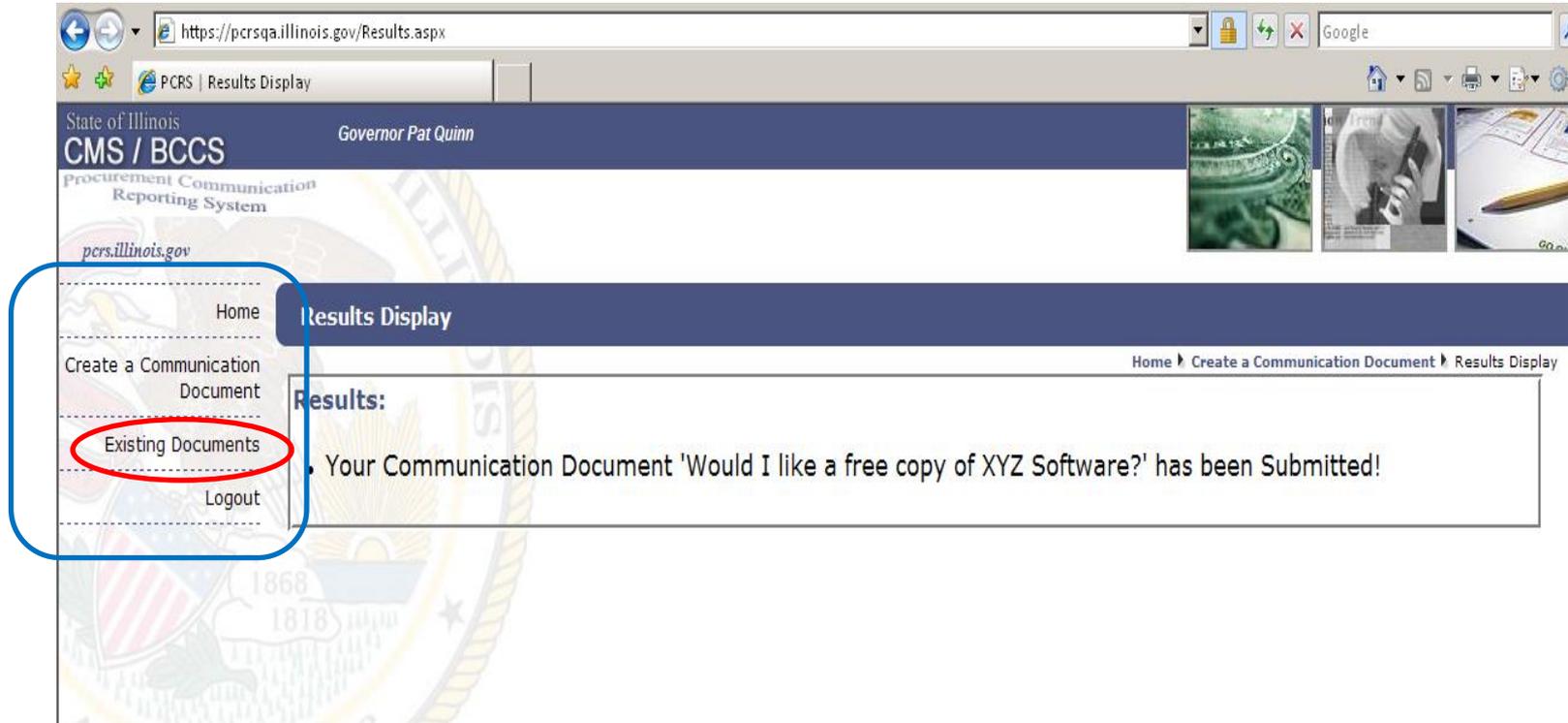
We are given a warning:



We are asked because once we submit this Communication Document, we can never edit it again.

We can view it later, but we cannot edit it.

After we click OK, the system gives us some feedback information:



This is a “logical” conclusion to a Communication Document, so we notice that no buttons exist on this screen.

We must use the navigation bar hyperlinks to move from this screen.

After we choose [Existing Documents](#), we see...

We notice that the Communication Document we created is no longer in our top “needing completed” panel. It is in the bottom panel showing that it has been “submitted”.

The center panel is also now showing that we need a written description of the communication from the registered lobbyist. This entry serves as a reminder to us that we are waiting for that written document.

**Existing Documents** Home ▶ Existing Documents

---

**Communication Documents Needing Completed**  
You Have No Unsubmitted Communication Documents  
| < < Page 0 of 0 ( 0 records total ) > > |

---

**Communication Records Requiring Lobbyist Reports**

	<u>Topic</u>	<u>Date/Time</u>	<u>Reference</u>	<u>Lobbyist</u>	<u>Representing</u>
<a href="#">Attach</a>	Would I like a free copy of XYZ Software?	10/7/2010 4:00 PM		Barney Rubble	Bedrock Interests

| < < Page 1 of 1 ( 1 records total ) > > |

---

**Communication Documents Submitted Previously**

	<u>Topic</u>	<u>Date/Time</u>	<u>Status</u>	<u>Reference</u>	<u>Initiator</u>	<u>Representing</u>
<a href="#">Details</a>	Would I like a free copy of XYZ Software?	10/7/2010 4:00 PM	Submitted		Fred Flintstone	Slate Gravel Quarry

| < < Page 1 of 1 ( 1 records total ) > > |

Once we have that written document, in the form a PDF (Portable Document Format) file, we can attach it to the Communication Document. The PDF file can be generated by a scanner, or the lobbyist may have sent such a file. Whatever the method that we received the file, PDF is the only format that can be attached to a Communication Document.

Assuming we have the PDF and we are ready to attach it, we click the **Attach** button next to entry under “Communication Documents Requiring Lobbyist Reports”, and we see:

We can type the filename of where the PDF file is located on our computer, or we can click the **Browse...** button to locate it.

## Attach Lobbyist Report

[Home](#) ▶ [Existing Documents](#) ▶ [Attach Lobbyist Repo](#)

### Communication Document Heading

Communication Identifier	<b>231</b>
Communication Topic	<b>Would I like a free copy of XYZ Software?</b>
Communication Mode	<b>Phone</b>
Author's Agency	<b>CMS - Central Management Services</b>
Communication Date/Time	<b>10/7/2010 4:00:00 PM</b>
Duration in Minutes	<b>2</b>
Agency Reference Number	

### Communication Document Participant Detail

First Name	<b>Barney</b>
Last Name	<b>Rubble</b>
Name Suffix (e.g., Sr., Jr., III)	
Participant Type	<b>Lobbyist</b>
Participant Role	<b>Contributor</b>
Job Title	<b>Lobbyist</b>
Representing	<b>Bedrock Interests</b>
Location	<b>2387 Witchhazel Ln, Shale City, WA</b>
Telephone Number	<b>988-555-1212</b>
Email Address	

Attach the Lobbyist Report scanned into PDF format. Enter the Lobbyist Report .pdf path and filename.

Lobbyist Report Attachment

**Browse...**

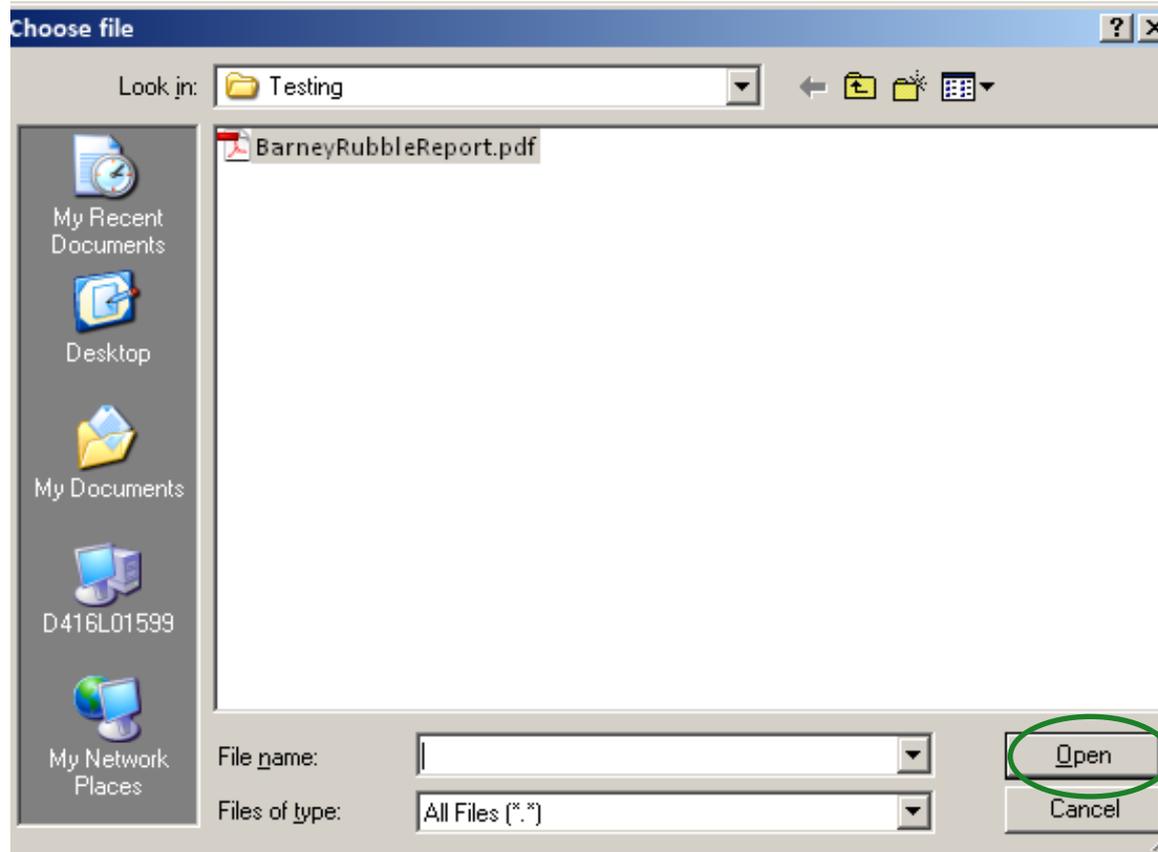
**Preview**

Click the PREVIEW Button to see the PDF attachment.

**Cancel**

Click the Cancel Button to exit without attaching.

Clicking the Browse... button, we get a pop-up window:



Using a dialog such as this should be familiar, and we easily locate our file, then click **Open**.

Either typing the filename or having used the Browse... button will get us to this point:

**Attach Lobbyist Report**

Home ▶ Existing Documents ▶ Attach Lobbyist Repo

### Communication Document Heading

Communication Identifier	<b>231</b>
Communication Topic	<b>Would I like a free copy of XYZ Software?</b>
Communication Mode	<b>Phone</b>
Author's Agency	<b>CMS - Central Management Services</b>
Communication Date/Time	<b>10/7/2010 4:00:00 PM</b>
Duration in Minutes	<b>2</b>
Agency Reference Number	

### Communication Document Participant Detail

First Name	<b>Barney</b>
Last Name	<b>Rubble</b>
Name Suffix (e.g., Sr., Jr., III)	
Participant Type	<b>Lobbyist</b>
Participant Role	<b>Contributor</b>
Job Title	<b>Lobbyist</b>
Representing	<b>Bedrock Interests</b>
Location	<b>2387 Witchhazel Ln, Shale City, WA</b>
Telephone Number	<b>988-555-1212</b>
Email Address	

Attach the Lobbyist Report scanned into PDF format. Enter the Lobbyist Report .pdf path and filename.

Lobbyist Report Attachment

C:\Documents and Settings\gregory.lovekamp\Desktop\Testing\BarneyRubbleReport.pdf

Click the PREVIEW Button to see the PDF attachment.

Click the Cancel Button to exit without attaching.

Before we can submit the Lobbyist Report, we must click the **Preview** button to see it:

**Communication Document Heading**

Communication Identifier	<b>231</b>
Communication Topic	<b>Would I like a free copy of XYZ Software?</b>
Communication Mode	<b>Phone</b>
Author's Agency	<b>CMS - Central Management Services</b>
Communication Date/Time	<b>10/7/2010 4:00:00 PM</b>
Duration in Minutes	<b>2</b>
Agency Reference Number	

**Communication Document Participant Detail**

First Name	<b>Barney</b>
Last Name	<b>Rubble</b>
Name Suffix (e.g., Sr., Jr., III)	
Participant Type	<b>Lobbyist</b>
Participant Role	<b>Contributor</b>
Job Title	<b>Lobbyist</b>
Representing	<b>Bedrock Interests</b>
Location	<b>2387 Witchhazel Ln, Shale City, WA</b>
Telephone Number	<b>988-555-1212</b>
Email Address	



9	and the provision of any service or activity committed by
10	law to the jurisdiction or responsibility of the Illinois
11	Department of Transportation, including the direct or
12	reimbursable expenditure of all federal funds for which the
13	Department of Transportation is responsible or accountable
14	for the use thereof in accordance with federal law,
15	regulation, or procedure, the Secretary of Transportation.

**Submit**

Click the Submit Button to exit saving attachment.

**Cancel**

Click the Cancel Button to exit without attaching.

Naturally, all of the controls are available to view the PDF attachment: **paging, zoom, and scrollbars** allow as thorough of preview as is desired.

Once the image is previewed, it can be submitted by clicking **Submit**, and results are displayed:

https://pcrsqa.illinois.gov/Results.aspx

State of Illinois  
CMS / BCCS  
Governor Pat Quinn  
Procurement Communication Reporting System  
pcrs.illinois.gov

Home  
Create a Communication Document  
**Existing Documents**  
Logout

Results Display

Home ▶ Create a Communication Document ▶ Results Display

Results:

- File: BarneyRubbleReport.pdf Uploaded Successfully!

Again, this is a conclusion step of a process, so the **navigation bar** is the only way to exit this screen.

**Existing Documents** returns our listing of work:

Browser address bar: <https://pcrsqa.illinois.gov/UserConsole.aspx>

Page Header: State of Illinois, Governor Pat Quinn, CMS / BCCS, Procurement Communication Reporting System, [pcrs.illinois.gov](http://pcrs.illinois.gov)

Navigation: Home, Existing Documents, Create a Communication Document, Existing Documents, Logout

Existing Documents

Communication Documents Needing Completed  
You Have No Unsubmitted Communication Documents  
< < Page 0 of 0 ( 0 records total ) > >

Communication Records Requiring Lobbyist Reports  
You Have No Outstanding Lobbyist Reports  
< < Page 0 of 0 ( 0 records total ) > >

**Communication Documents Submitted Previously**

	Topic	Date/Time	Status	Reference	Initiator	Representing
<a href="#">Details</a>	Would I like a free copy of XYZ Software?	10/7/2010 4:00 PM	Submitted		Fred Flintstone	Slate Gravel Quarry

< < Page 1 of 1 ( 1 records total ) > >

At this point, our previously created Communication Document shows in our “Submitted Previously” panel, and our top two “work in progress” panel show we have nothing left to do.

[This completes our training tutorial.](#)

# What if I need help?



- For Ethical Questions related to a decision to report a communication, you must contact your agency or university's Ethics Officer.
- For technical assistance, you may call the Procurement Call Center at 866-455-2897 or 217-557-5695. This is for technical assistance ONLY. Call Center staff cannot assist you for any other purpose.
- Technical assistance is also available by emailing:  
[ppb.pcrs@illinois.gov](mailto:ppb.pcrs@illinois.gov)

end