MARICOPA COUNTY PUBLIC HEALTH

Purchase Portal Phase 2

Finance and Administration, Purchasing and Contracts, October 3, 2024

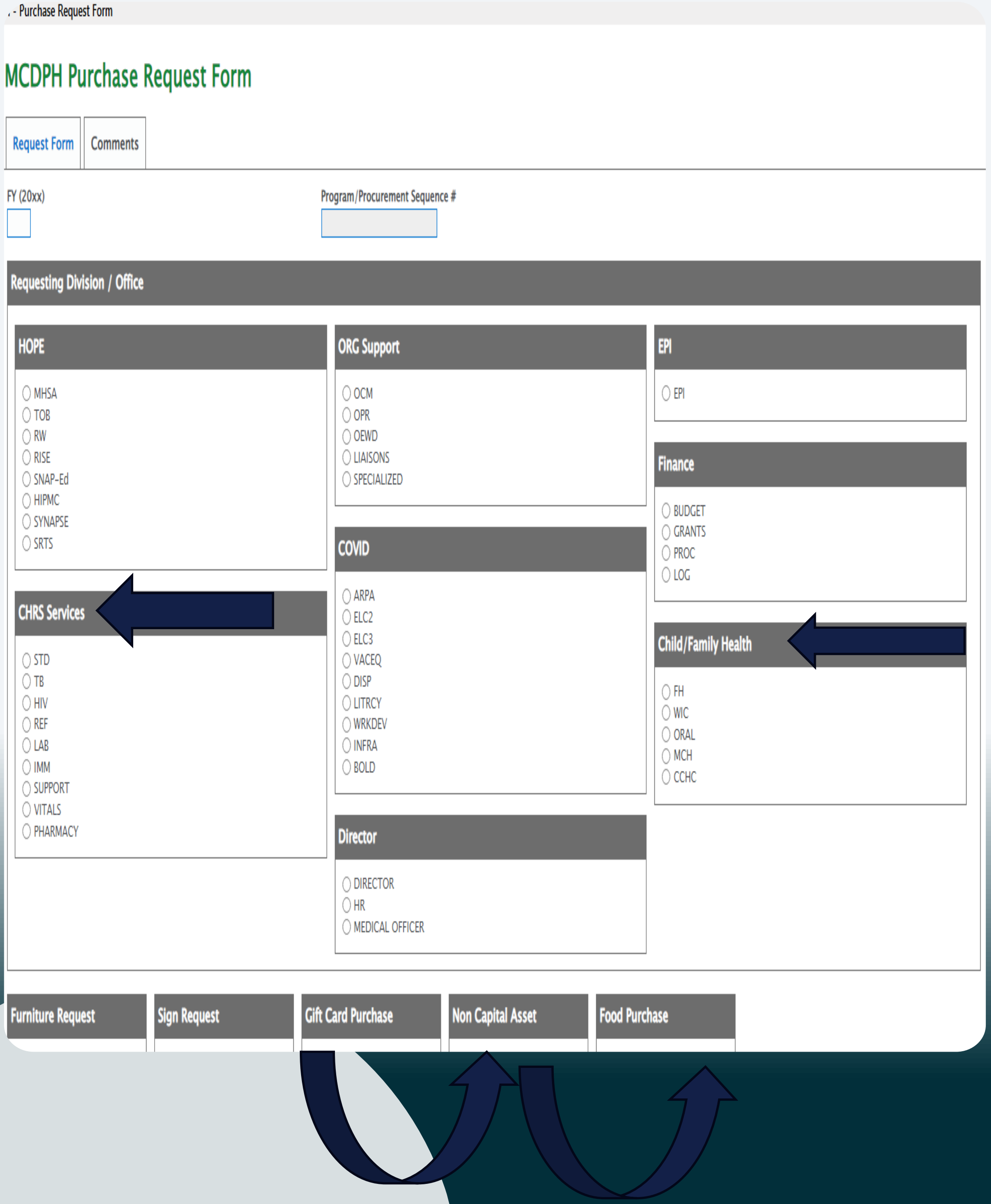
Important Reminders About Your Purchase Request Form (PRF)

- Some programs use a version of the old paper PRF as part of their own internal processes. Procurement cannot process a PRF based upon that document so no need to email it to us. We can only process a PRF that has been properly submitted in the Purchase Portal.

- Submitting complete information with your PRF is of utmost importance such as log-in information, websites, quotes, signed documents (CIs/SSs, agreements, food memos, approvals etc.), complete and accurate accounting strings, complete vendor information including MAs, and so forth. Failure to do so will likely delay completion of your PRF. If we need to contact you to obtain this information we will make 2 attempts via email and include a note in the PRF. Failure to respond after 2 attempts will result in a rejected PRF.

- PAC needs 2 weeks to process PRFs, especially during peak periods which, for PAC, generally lasts from April/May – August/September. Requests for expedited procurements MUST come through the Procurement Supervisor because many considerations go into whether to expedite a PRF which the Procurement Specialist (PS) may not be aware of.

- Procurement planning, even on smaller purchases, can be an important aspect in ensuring a smooth purchase. Remember the PSs support multiple programs within the department so any time they spend addressing an avoidable problem is time away from completing work for other programs. Working with the program to plan the purchase or procurement is productive time spent and can eliminate most if not all avoidable problems.



. - Purchase Request Form

MCDPH Purchase Request Form

Request Form | Comments

FY (20xx)

Program/Procurement Sequence #

Requesting Division / Office

HOPE	ORG Support	EPI
MHSA	OCM	EPI
TOB	OPR	
RW	OEWD	
RISE	LIAISONS	
SNAP-Ed	SPECIALIZED	
HIPMC		
SYNAPSE		
SRTS		

Finance: BUDGET, GRANTS, PROC, LOG

CHRS Services: STD, TB, HIV, REF, LAB, IMM, SUPPORT, VITALS, PHARMACY

COVID: ARPA, ELC2, ELC3, VACEQ, DISP, LITRCY, WRKDEV, INFRA, BOLD

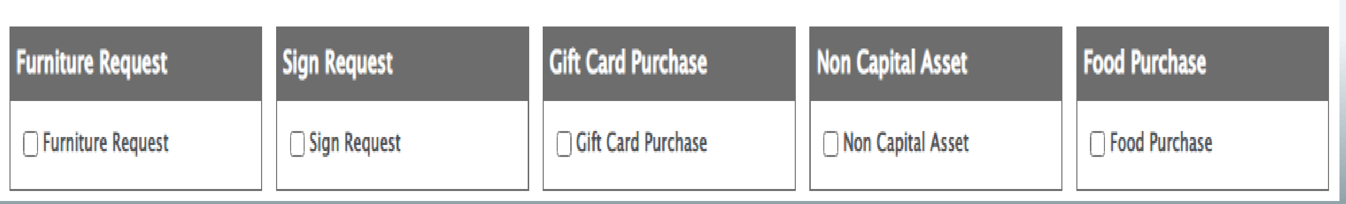
Child/Family Health: FH, WIC, ORAL, MCH, CCHC

Director: DIRECTOR, HR, MEDICAL OFFICER

Furniture Request | Sign Request | Gift Card Purchase | Non Capital Asset | Food Purchase

Purchase Request Form Changes

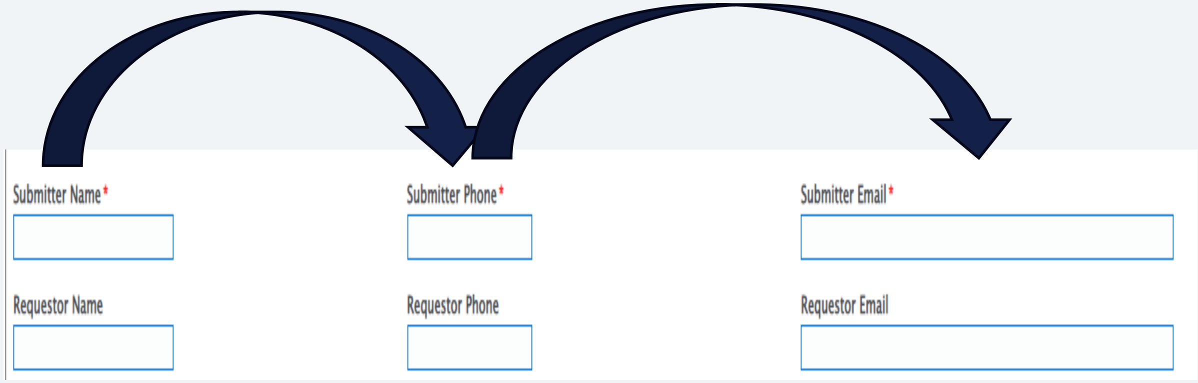
- Two division name updates—Child & Family Health and Community Health and Records Services.
- New check boxes added for Gift Card Purchases, Non-Capital Assets, and Food Purchases to enable reports to be run.
- Furniture and Sign check boxes still exist for reporting purposes but will not go through workflow as they are to be **submitted to FMD**.



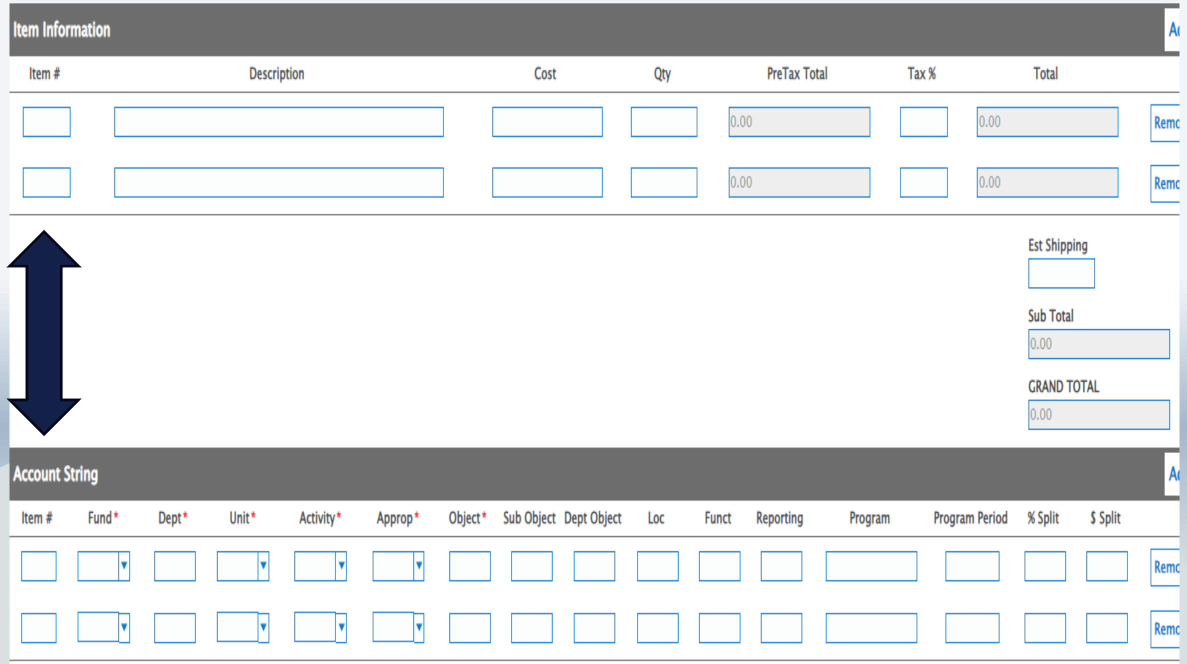
Furniture Request	Sign Request	Gift Card Purchase	Non Capital Asset	Food Purchase
Furniture Request	Sign Request	Gift Card Purchase	Non Capital Asset	Food Purchase

PLEASE NOTE: The final form will now be called FINAL PURCHASE FORM (formerly called Purchase Requisition Form)

Purchase Request Form Changes (continued)

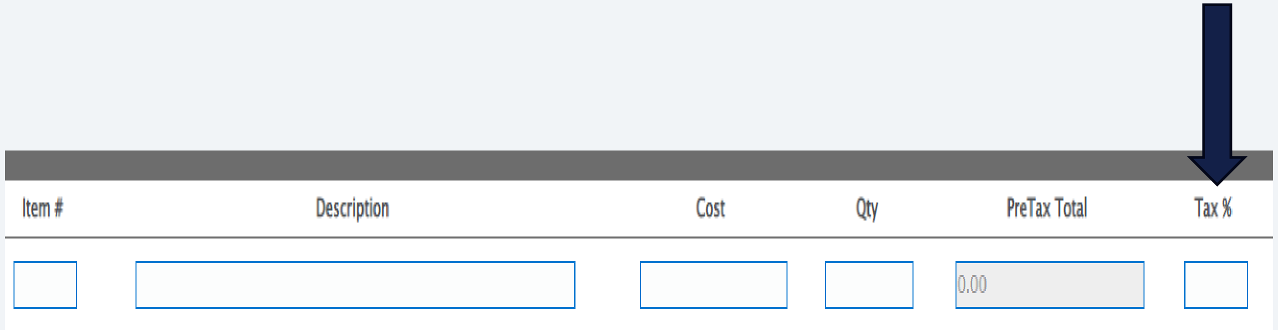


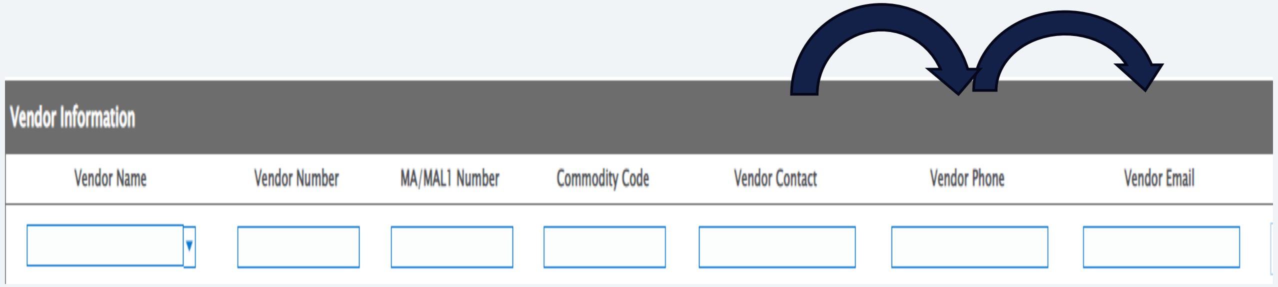
- Submitter contact information has been added. This would be the person submitting the PRF. The Requestor would be the Individual who has the need for the item being purchased.

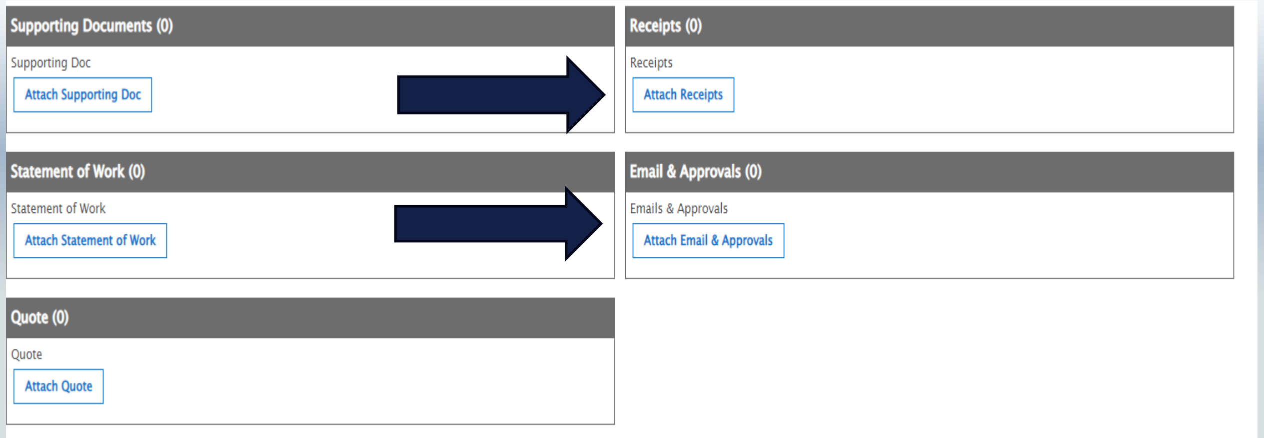


- Item # has been added to both the Item Information and Accounting String field to enable the Submitter to associate different accounting strings with specific line items if multiple accounting strings are needed.

Purchase Request Form Changes (Continued)







- The tax field has been converted to a percentage.
- Additional vendor contact information has been added and is to be completed by the Submitter, i.e., vendor name, vendor number (VSS), MA/MAL1, commodity code, vendor contact, phone, and email.

NOTE: THE PROGRAM IS REQUESTED TO COMPLETE ALL VENDOR INFORMATION WITH THE EXCEPTION OF THE MA# AND COMMODITY CODE, UNLESS KNOWN. FAILURE TO DO SO WILL LIKELY DELAY PROCESSING OF YOUR PRF.

- Additional supporting documents have been added to include any receipts, emails, or approvals received.
- All attachments will retain their original file name as opposed to being converted to the same system generated file name as shown below which will eliminate the need to open every document attached when looking for a particular document.

PH – Supporting Doc – 9/12/2024 – SUPPORTING DOC

Email Notifications

You asked, we listened! Email notifications have now become more informative!

- Visible mandatory note so anyone who accesses a PRF is aware when it is placed on Hold or Returned to Requestor.
- For the Accountant Reject Request, Accountant Cancel Request, Accountant 24 Hour Reminder, Approval 2500+ 24 Hour Reminder, Manager 24 Hour Reminder the following fields have been added:
    - Initial Request Type
    - Requested Vendor Name
    - Description

The notification will appear as follows:

Recipients: PH – Requestor Email
Subject Line: Purchase Request Rejected
Body of Email: Hello
Your Purchase Request with the following information has been Rejected.
Program Sequence #: 25-000123
Date Submitted: 10/3/2024
Initial Request Type: **PCard**
Requested Vendor Name: **Home Depot**
Requested Amount: $10,000
Description: shelving with movable shelves and locking wheels
Requesting Division: %K03915.1
Requesting Program: %K03948.1
Reason for Rejection from Accountant: Incomplete

Email Notifications (Continued)

The item ordered notification:

Recipients: PH – Requestor
Subject Line: Item Ordered
Body of Email:
Program Sequence #: 25-000123
Date Received into Procurement Inbox 9/27/24
Final Request Type: **PCard**
Final Vendor Name: **Home Depot**
Final Amount: **$5,000**
Description: shelving with movable shelves and locking wheels
Requesting Division: CHRS
Requesting Program: Pharmacy

Procurement Hold:

Recipients: Assigned To, PH – Requestor Email
Subject Line: Purchase Request on Hold
Body of Email:
Purchase Request with the following information has been placed on Hold
Program Sequence #: 25-000123
Date Submitted: 10/3/24
Date Received into Procurement Inbox 9/27/24
Initial Request Type: PO
Requested Vendor Name: **Martha Stewart's Kitchen**
Requested Amount: **$10,000**
Description: Series of video culinary demonstrations to underprivileged families on easy, nutritious meals
Requesting Division: Child/Family Health
Requesting Program: FH
Reason for Hold from Incomplete

These are a few examples of the additional information that will be included in the email notifications. Additional email notifications you can expect to receive include Procurement Hold 1 Week Hold Reminder, Rejected to Accountant, Requester Submitted, and Requestor Notify.

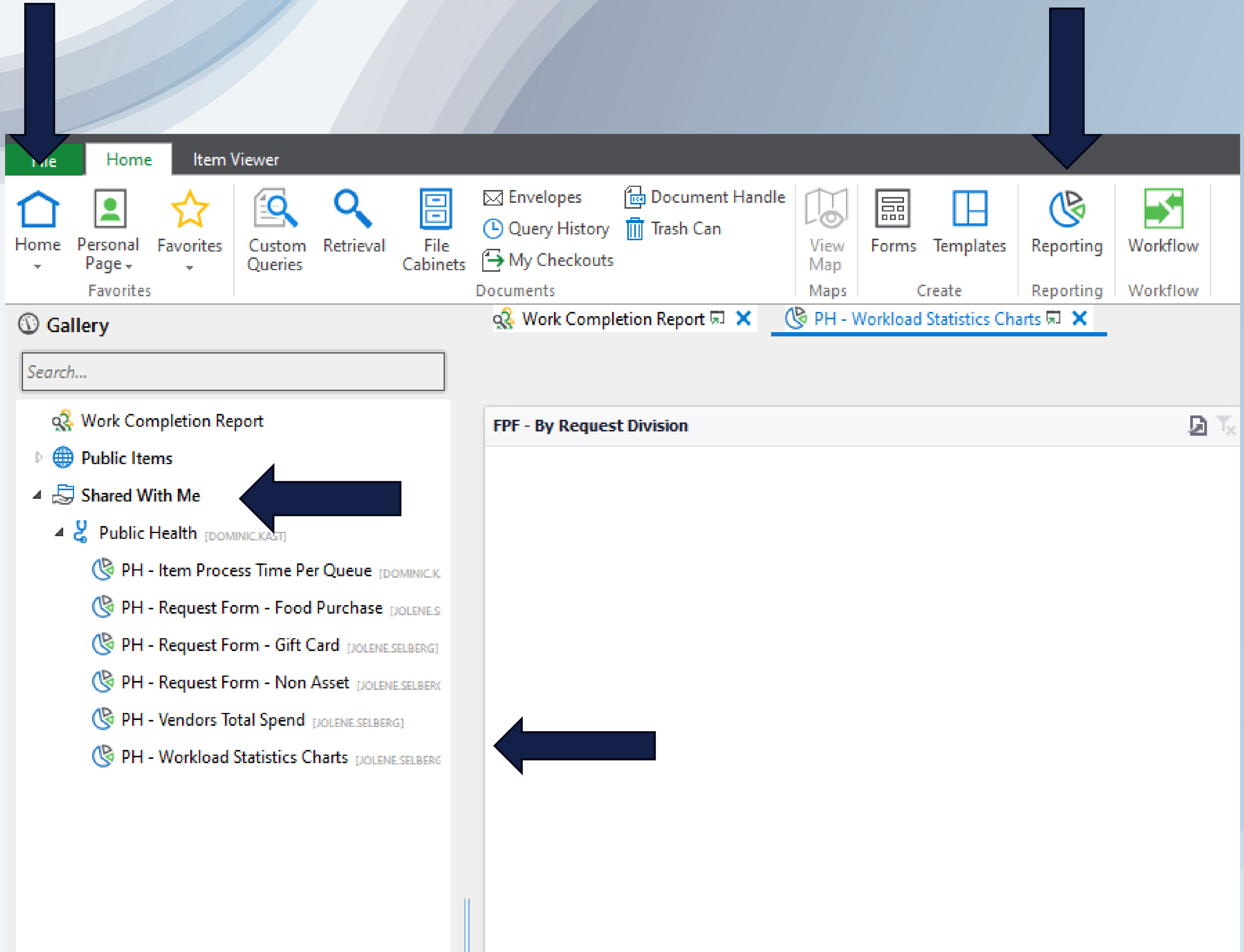
Reporting

Phase 2 of the Purchase Portal now includes reporting capabilities to assist in tracking various data points to include:

- Item Process Time In Queue
- Request Form – Food Purchases
- Request Form – Gift Cards
- Request Form – Non-Capital Assets
- Vendor Total Spend
- Workload Statistics

While these reports are primarily to assist PAC, Logistics, and management to effectively and efficiently gather workload and performance statistics, track certain expenditures, and track spend trends, programs will also be able to better monitor and plan for renewable annual purchases, determine average procurement processing timeframes, and determine spend trends for food, gift card, non-capital assets, and by vendor.

Reporting (Continued)

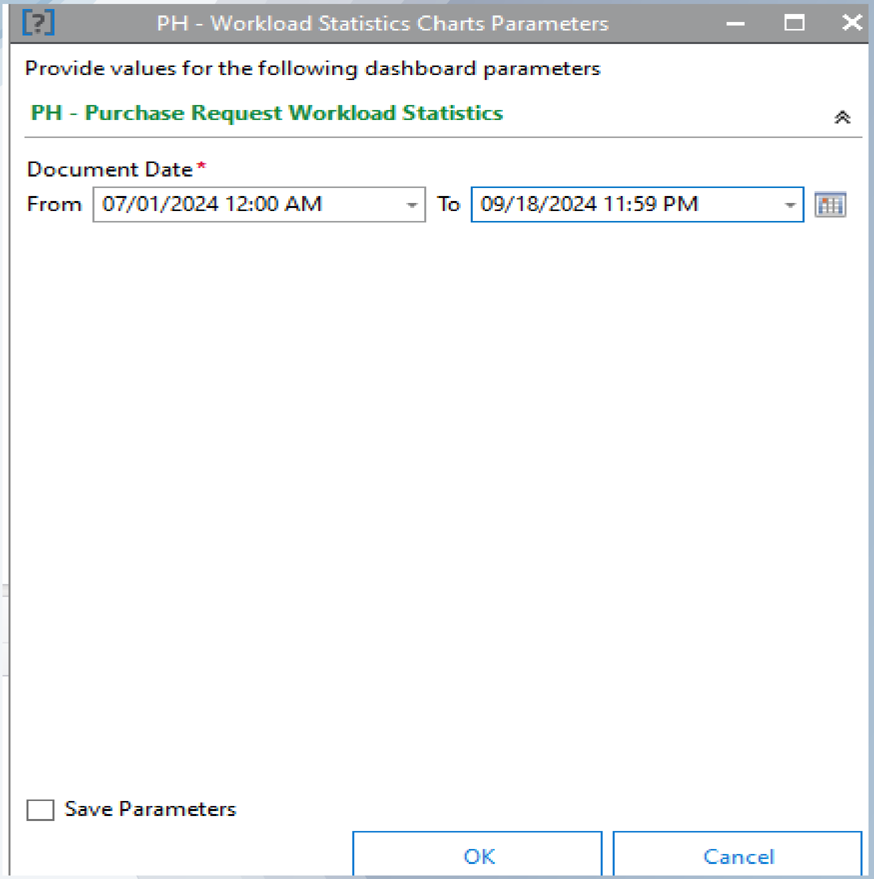


WORKLOAD STATISTICS

To generate a report to track renewable annual purchases:

On the Home screen,
click on Reporting,
then Shared With Me, and then
and choose the Workload Statistics Chart.

Reporting (Continued)



When the date range window pops up, select the date range in which you wish to search and select OK.

As shown on the following slide you can sort the data by division, program, and procurement specialist. You can also export the data to an image, pdf, or Excel from data points in the graphic to capture qualitative and quantitative information, as needed. You can print from this point as well. If you do not wish to export the data, you can also sort the data columns within the graph.

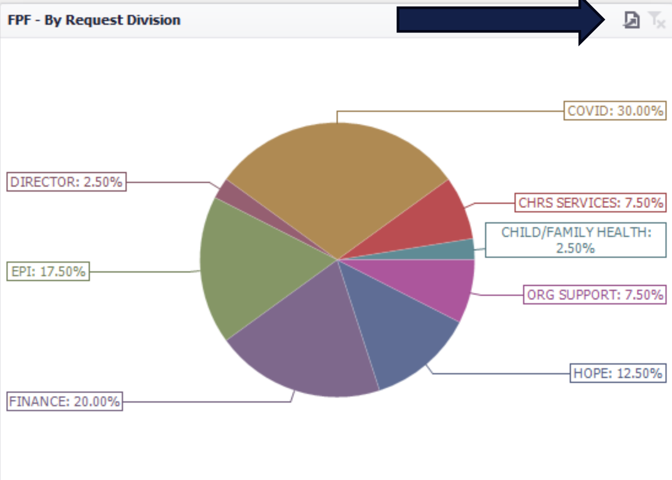
NOTE: THIS IS A TOOL THAT WILL ENABLE PROGRAMS TO BETTER TRACK THEIR RENEWABLE PROCUREMENTS SUCH AS SUBSCRIPTIONS, LICENSES, MAINTENANCE RENEWALS, ETC. REPORTS CAN BE GENERATED AS OFTEN AS NEEDED, BUT IT IS RECOMMENDED A REPORT BE GENERATED AT LEAST ONCE AMONTH AS THERE IS NOW A SIMPLE MEANS BY WHICH TO TRACK THESE.

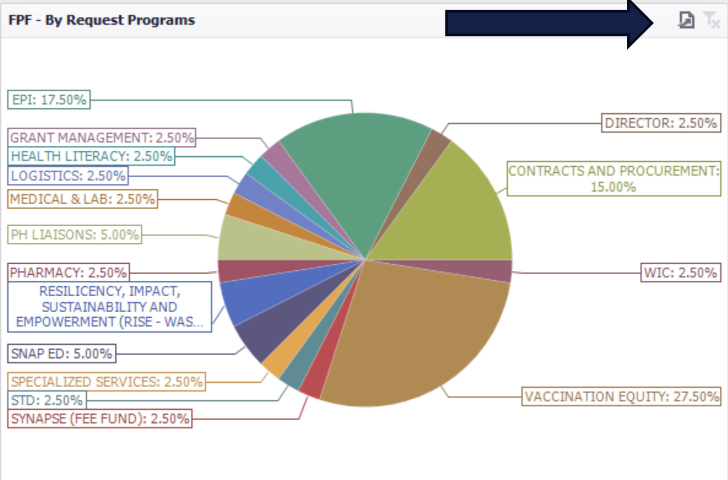
Reporting (Continued)

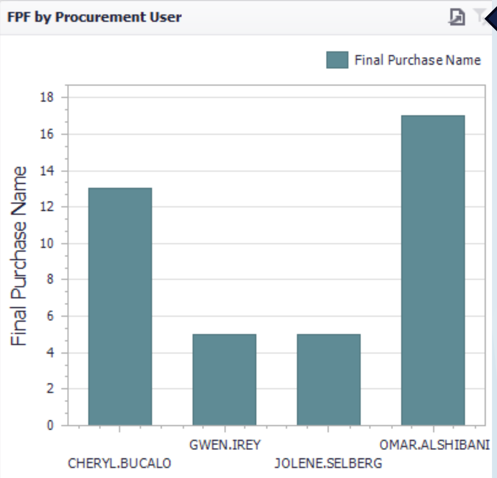
Sort by Division, Program, or PS by clicking on the pie

Export or print

Sort by column







Document Info

Program Sequence #	Document Name	Date	Procurement User	Request Division	Request Program	PH - Vendor Name	Invoice Amount (Sum)	Document ID
24-002034	PH - Final Purchase Form	8/22/2024	JOLENE.SELBERG	HOPE	RESILICENCY, IMPACT, SUSTAINABILITY AND EMPOWERMENT (RISE - WAS PREVIOUSLY OCE)	BARRO'S PIZZA	$105.00	37303307
24-002035	PH - Final Purchase Form	8/22/2024	JOLENE.SELBERG	CHILD/FAMILY HEALTH	WIC	AMAZON	$3,195.00	37303308
24-002038	PH - Final Purchase Form	9/4/2024	CHERYL.BUCALO	FINANCE	CONTRACTS AND PROCUREMENT	A1 CORPORATE HQ LLC	$5,500.00	37303619
24-002042	PH - Final Purchase Form	9/8/2024	JOLENE.SELBERG	HOPE	SNAP ED	4041 CENTRAL PLAZA LLC		37303722
24-002043	PH - Final Purchase Form	9/9/2024	CHERYL.BUCALO	FINANCE	CONTRACTS AND PROCUREMENT	4IMPRINT	$50,000.00	37303731
24-002044	PH - Final Purchase Form	9/11/2024	CHERYL.BUCALO	COVID	VACCINATION EQUITY	BUCKSTAFF PUBLIC SAFETY INC	$70,000.00	37303930
25-000026	PH - Final Purchase Form	8/21/2024	JOLENE.SELBERG	CHRS SERVICES	STD	WALLMONKEYS	$21.20	37303298
25-000027	PH - Final Purchase Form	8/21/2024	JOLENE.SELBERG	COVID	HEALTH LITERACY	OFFICE DEPOT	$179.99	37303297
25-000028	PH - Final Purchase Form	8/22/2024	OMAR.ALSHIBANI	COVID	VACCINATION EQUITY	MCKESSON	$21,720.00	37303338
25-000029	PH - Final Purchase Form	8/22/2024	OMAR.ALSHIBANI	COVID	VACCINATION EQUITY	COMPLETE PRINT SHOP INC	$53.21	37303337
25-000030	PH - Final Purchase Form	8/22/2024	GWEN.IREY	EPI	EPI	CDWG	$28.95	37303344
25-000031	PH - Final Purchase Form	8/22/2024	GWEN.IREY	EPI	EPI	GRAINGER	$5,549.46	37303343
25-000032	PH - Final Purchase Form	9/4/2024	CHERYL.BUCALO	EPI	EPI	ACRO	$17,000.00	37303615
25-000033	PH - Final Purchase Form	9/4/2024	CHERYL.BUCALO	FINANCE	CONTRACTS AND PROCUREMENT	CHIPOTLE	$5,100.00	37303621
25-000034	PH - Final Purchase Form	9/4/2024	CHERYL.BUCALO	FINANCE	CONTRACTS AND PROCUREMENT	FRESH START WOMEN'S FOUNDATION	$3,000.00	37303620
25-000035	PH - Final Purchase Form	9/6/2024	GWEN.IREY	FINANCE	CONTRACTS AND PROCUREMENT	GOD	$200,000,000.00	37303682

Reporting (Continued)

NON-CAPITAL ASSETS

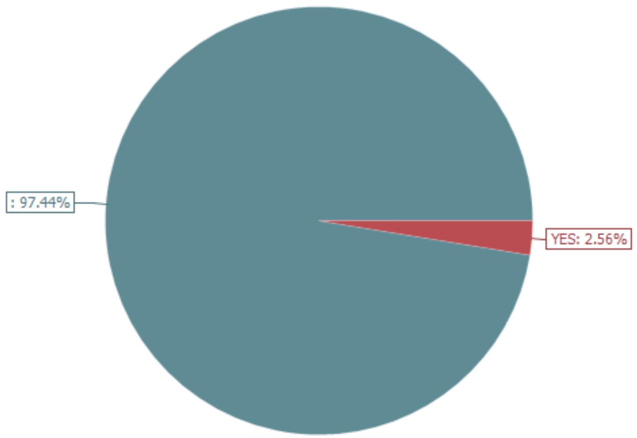
Print or export

All, Yes or No

- [x] (All)
- [x]
- [x] YES

Here you can choose to see all transactions for the period selected or just those that are non-capital assets. In this case all is selected so all transactions are showing. By clicking yes only, just those that are non-capital assets will show. In this selection, one transaction is a non-capital asset and it is also highlighted below.

Yes or No



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Document Info

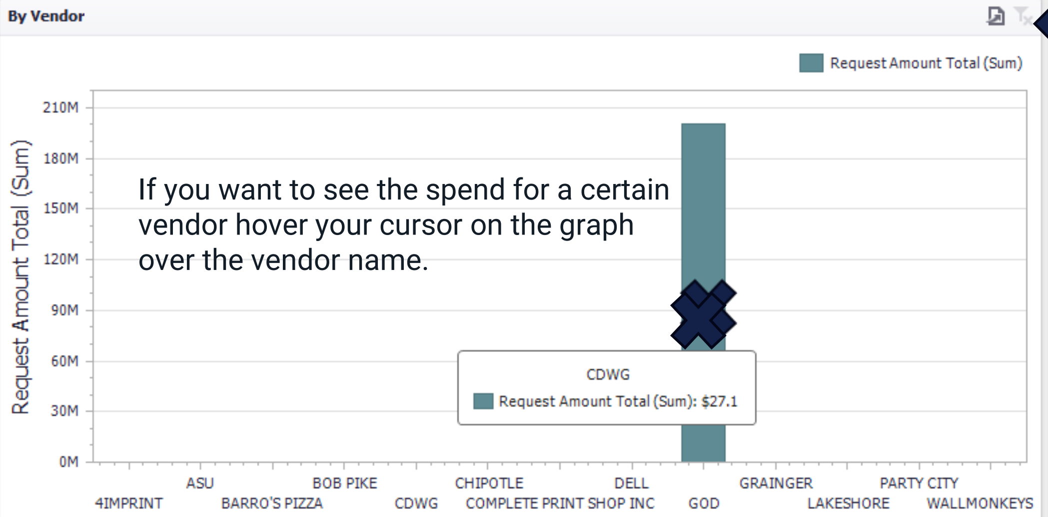
Pie chart result

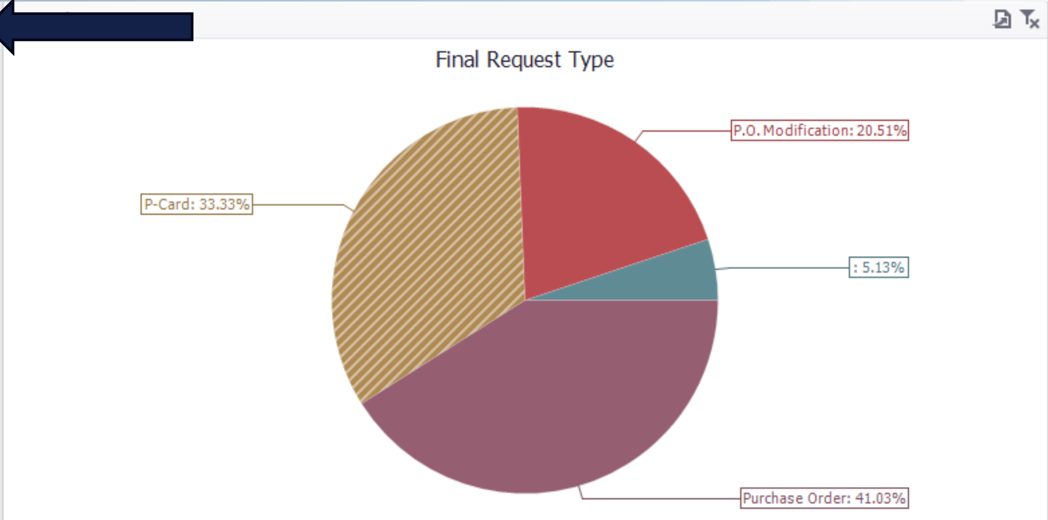
Program Sequence #	Document Name	Document Date (Day-Month-Year)	Vendor Name	Non Capital Asset
24-002034	PH - Final Purchase Form - 8/22/2024 - 24-002034 - BARRO'S PIZZA - COMPLETED	8/22/2024	BARRO'S PIZZA	
24-002035	PH - Final Purchase Form - 8/22/2024 - 24-002035 - AMAZON - PROCUREMENT REJECTED	8/22/2024	AMAZON	
24-002038	PH - Final Purchase Form - 9/4/2024 - 24-002038 - A1 CORPORATE HQ LLC - COMPLETED	9/4/2024	A1 CORPORATE HQ LLC	
24-002042	PH - Final Purchase Form - 9/8/2024 - 24-002042 - 4041 CENTRAL PLAZA LLC - PROCUREMENT REJECTED	9/8/2024	4041 CENTRAL PLAZA LLC	
24-002043	PH - Final Purchase Form - 9/9/2024 - 24-002043 - 4IMPRINT - PROCUREMENT WORKING	9/9/2024	4IMPRINT	
24-002044	PH - Final Purchase Form - 9/11/2024 - 24-002044 - BUCKSTAFF PUBLIC SAFETY INC - PO PENDING	9/11/2024	BUCKSTAFF PUBLIC SAFETY INC	
25-000026	PH - Final Purchase Form - 8/21/2024 - 25-000026 - WALLMONKEYS - COMPLETED	8/21/2024	WALLMONKEYS	
25-000027	PH - Final Purchase Form - 8/21/2024 - 25-000027 - OFFICE DEPOT - COMPLETED	8/21/2024	OFFICE DEPOT	
25-000028	PH - Final Purchase Form - 8/22/2024 - 25-000028 - MCKESSON - COMPLETED	8/22/2024	MCKESSON	
25-000029	PH - Final Purchase Form - 8/22/2024 - 25-000029 - COMPLETE PRINT SHOP INC - COMPLETED	8/22/2024	COMPLETE PRINT SHOP INC	
25-000030	PH - Final Purchase Form - 8/22/2024 - 25-000030 - CDWG - COMPLETED	8/22/2024	CDWG	
25-000031	PH - Final Purchase Form - 8/22/2024 - 25-000031 - GRAINGER - COMPLETED	8/22/2024	GRAINGER	YES
25-000032	PH - Final Purchase Form - 9/4/2024 - 25-000032 - ACRO - COMPLETED	9/4/2024	ACRO	
25-000033	PH - Final Purchase Form - 9/4/2024 - 25-000033 - CHIPOTLE - COMPLETED	9/4/2024	CHIPOTLE	
25-000034	PH - Final Purchase Form - 9/4/2024 - 25-000034 - FRESH START WOMEN'S FOUNDATION - COMPLETED	9/4/2024	FRESH START WOMEN'S FOUNDATION	
25-000035	PH - Final Purchase Form - 9/6/2024 - 25-000035 - GOD - COMPLETED	9/6/2024	GOD	
25-000036	PH - Final Purchase Form - 9/6/2024 - 25-000036 - ASU - COMPLETED	9/6/2024	ASU	
25-000037	PH - Final Purchase Form - 9/6/2024 - 25-000037 - MCKESSON - COMPLETED	9/6/2024	MCKESSON	

Reporting (Continued)

TOTAL SPEND – We envision over time we will identify different uses for this information. Currently, it is intended to track total spend on different final request types, but it will also enable us to track total spend by vendor for nominal value purchases.

Print or export





Document Info

Program Sequence #	Document Name	Document Date (Day-Month-Year)	PH - Vendor Name	Vendor Name	Request Amount Total (Sum)	Final Request Type
24-002034	PH - Final Purchase Form - 8/22/2024 - 24-002034 - BARRO'S PIZZA - COMPLETED	8/22/2024	BARRO'S PIZZA	BARRO'S PIZZA	$105.00	P-Card
25-000026	PH - Final Purchase Form - 8/21/2024 - 25-000026 - WALLMONKEYS - COMPLETED	8/21/2024	WALLMONKEYS	WALLMONKEYS	$21.20	P-Card
25-000029	PH - Final Purchase Form - 8/22/2024 - 25-000029 - COMPLETE PRINT SHOP INC - COMPLETED	8/22/2024	COMPLETE PRINT SHOP INC	COMPLETE PRINT SHOP INC	$53.21	P-Card
25-000030	PH - Final Purchase Form - 8/22/2024 - 25-000030 - CDWG - COMPLETED	8/22/2024	CDWG	CDWG	$27.10	P-Card
25-000033	PH - Final Purchase Form - 9/4/2024 - 25-000033 - CHIPOTLE - COMPLETED	9/4/2024	CHIPOTLE	CHIPOTLE	$4,950.00	P-Card
25-000035	PH - Final Purchase Form - 9/6/2024 - 25-000035 - GOD - COMPLETED	9/6/2024	GOD	GOD	$200,200,000.00	P-Card
25-000036	PH - Final Purchase Form - 9/6/2024 - 25-000036 - ASU - COMPLETED	9/6/2024	ASU	ASU	$12,791.90	P-Card
25-000038	PH - Final Purchase Form - 9/6/2024 - 25-000038 - LAKESHORE - COMPLETED	9/6/2024	LAKESHORE	LAKESHORE	$6,403.93	P-Card
25-000040	PH - Final Purchase Form - 9/6/2024 - 25-000040 - BOB PIKE - COMPLETED	9/6/2024	BOB PIKE	BOB PIKE	$341.78	P-Card
25-000046	PH - Final Purchase Form - 9/6/2024 - 25-000046 - GRAINGER - COMPLETED	9/6/2024	GRAINGER	GRAINGER	$543.00	P-Card
25-000047	PH - Final Purchase Form - 9/6/2024 - 25-000047 - PARTY CITY - COMPLETED	9/6/2024	PARTY CITY	PARTY CITY	$64,000.00	P-Card
25-000049	PH - Final Purchase Form - 9/6/2024 - 25-000049 - DELL - COMPLETED	9/6/2024	DELL	DELL	$2,180.00	P-Card
25-000052	PH - Final Purchase Form - 9/6/2024 - 25-000052 - 4IMPRINT - COMPLETED	9/6/2024	4IMPRINT	4IMPRINT	$6,300.00	P-Card

A few more changes

Additional Changes

- All fields have been expanded so the full text can be seen. For example, some fields within the accounting line and the dollar amount fields have been being cut-off but this has now been fixed.

- The Final Purchase Form can now show a credit when appropriate.

- The in-queue ribbon statuses have now been made consistent across all queues and include more information providing more data points to identify individual PRFs in the absence of the PRF#; although for PAC, the PRF# is always preferred.

Program Sequence #	Request Type	Requestor	Requested Amount	Final Cost	Vendor Name	Purchase Request Division	Purchase Request Program	Date Submitted	Purch

More to Come?

Purchase Portal Phase 3

- Is there a Phase 3 coming? While there is not a definitive yes or no, we are tracking Phase 3 changes.
- Some of the desired changes for Phase 2 were rolled to Phase 3. Due to cost constraints, the desired changes requested were prioritized for Phase 2 and those that could be accomplished from a systems perspective are shown here.
- Some changes identified as Phase 2 priorities could not be implemented due to limitations within OnBase.
- These are only changes that have an impact on the programs or finance. There were other changes made that impact PAC only.
- As you work through the Phase 2 implementation, if there are additional capabilities you would like to see in the system, please send those to either Cheryl or Julia. If you had previously sent items for Phase 2 and it was not implemented, it has already been captured for Phase 3 or it could not be accomplished from a systems perspective so no need to send it again.

Any Questions?