

Procurement Newsletter

APRIL 2023

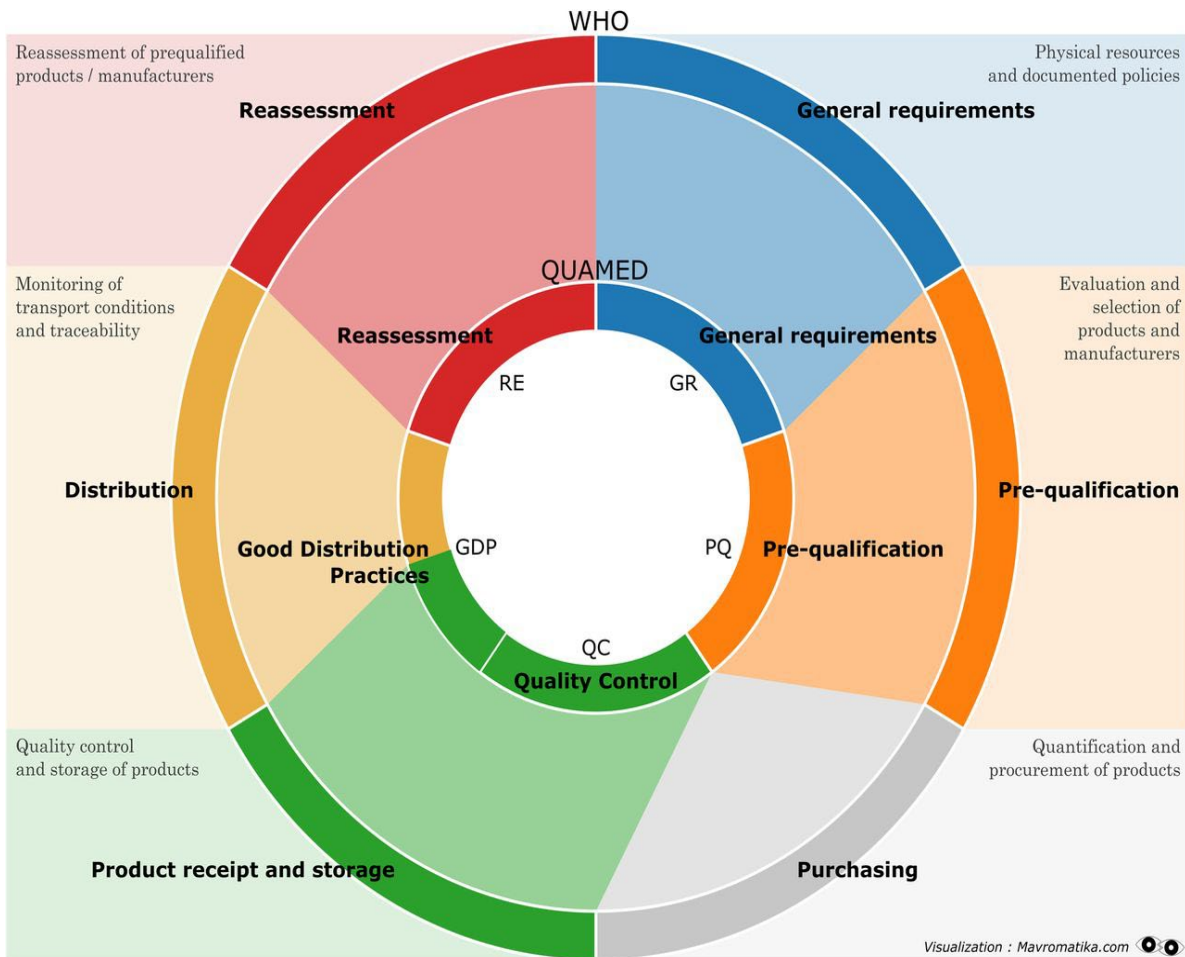


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PROCUREMENT FACTS

Procurement has many things to consider and document in order to be fair and transparent when seeking new services or supplies. The image below gives an overview of things that are considered.



If a vendor is not providing the service and/or materials agreed to, contact Procurement to review options.

During the 1st quarter of the year, the county has saved \$2.1K with Amazon. Consider consolidating orders more for bulk purchases. Bulk orders of 10 items or more can obtain you a better price. If you need help on how to do this, reach out to Procurement.

P-card Reconciliation of Charges



It is best practice to review and reconcile P-card charges at least weekly. There are several reasons for this:

Fraud – This has become more common. Unfortunately, several fraud charges show up each month. Watching your P-card charges closely will allow you to dispute the charge soon enough that Wells Fargo will credit the fraudulent charge back to the card.

Receipts – Have you ever lost a receipt? You say, I just had it! I put it here but now it's gone. Instead of setting them to the side, putting them in your pocket or that safe location, get them to the P-card reconciler right away.

Reconciliation – For those who have credit cards issued to them, they sign paperwork stating they will follow the County policy to use a county issued card. This includes that the card holder will reconcile charges at least every two weeks. Purchasing recommends at least weekly if not more.

For Travel charges, it is best practice to create a PO once you know your expense, meaning that it is showing in your online statement within Wells Fargo or the P-card portal. This requires checking online at least weekly.

The department head is ultimately accountable for the physical control and use (expenditures, budgets, accounts, etc.) for any cards assigned to their department. If you do your part, your department head will have better control of their budget.

The P-card Portal has provided a new tool to help P-card reconcilers. We are still working out some of the bugs, and we hope to make some enhancements to make it even more useful. Since this is a County-developed application, we have some flexibility on how it can be configured. We welcome your suggestions on ways that the Portal can work better for you.

Requisitions Approval Checklist



What is needed on a Requisition for PW or IT to review?

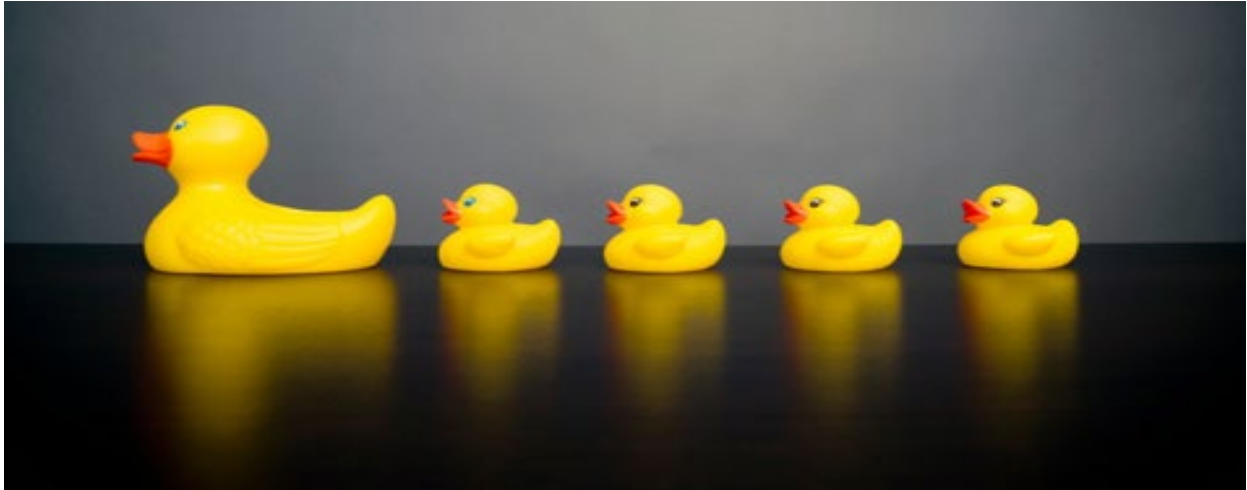
Certain PO requests require PW or IT department approval before Procurement can review them. To avoid delays in the review process, items that require PW or IT review need to have clarification in the description field of what is being obtained. E.g., cannot say chair or monitor. The description needs to be more specific, e.g., brand and model. This information is needed for PW or IT to review because some chairs or monitors are junk.



Did you know Procurement has set up the following online accounts with approved county ship to addresses?

Lowe's, Home Depot, Amazon, Staples, Office Depot. If you do not have access to order online and would like it, reach out to Tad Rasmussen.

Ducks in a Row Recognition



Ducks in a Row sounds just like what it means, someone who has their purchasing ducks in a row (their procurement process is within approved parameters and policies) to help the procurement move along in a smooth manner.

Procurement recognizes all your hard work and learning that goes with your job. We are aware of the challenges you deal with each day and are happy to help you with procurement issues anytime.

If you would like to mention someone who has their ducks in a row, reach out to procurement.

This month's Ducks in a Row recognition goes to Jamie Coombs and Shianne Shepherd in Public Works and Karla Saldana in Children's Justice Center.

Jamie, Shianne and Karla were selected because of their proactive approach to Procurement. They reach out with any questions before solicitations are started. They follow the parameters of the Procurement process and provide appropriate documentation to support payment.

Jamie and Shianne were also recommended because they volunteered to test, work out bugs and try to find issues with the paperless AP system. They have handled the change to paperless AP with insight and provided ideas to make the process better.

Karla starts a requisition with the end in mind. This helps her requests flow through the approval process because they meet procurement requirements from the beginning. Karla is fairly new to County procurement and will ask questions to get clarification when needed.

All three were asked a few "get to know you" questions:

Karla:

Q: What is the best vacation you have been on?

A: I love, love, love going to New York, they have the best food, great beaches (in the summertime), so many different cultures in one spot.

Q: If you could have dinner with one famous person who would it be?

A: I would love to have dinner with Steve Harvey!

Q: What is your biggest fear?

A: I hate spiders! (ewww)

Q: If you could live in one place in the world, where would it be?

A: Anywhere warm with a beach. 😊

Jamie:

Q: How long have you been with the county?

A: Almost 4 years.

Q: What is the best vacation you have been on?

A: Took a backroad trip to Loveland Colorado to attend a Clinton Anderson horse clinic.

Q: If you could have dinner with one famous person who would it be?

A: Willie Nelson

Shianne:

Q: How long have you been with the county?

A: 5 years 6 months

Q: What is your biggest fear?

A: Spiders or car accidents.

Q: What is the best vacation you have been on?

A: My favorite vacation is going to Vegas in December for the National Finals Rodeo.

Congratulations to Karla, Jamie and Shianne!



Procurement Questions and Answers:

Question: What are ways to find chairs approved by PW?

Answer: Reach out to Purchasing and/or PW to see what they recommend. You can also search by keyword in the PO Lookup Parameters for Search tab PO description field. Type chair in the PO Description field to see what other options have been approved by PW. Searching by key word will pull up both P-card vendors and vendors paid by ACH or check.

Question: Why is it recommended to reconcile P-cards on a weekly basis or daily basis

Answer: Reconciling P-cards often helps you stay on top of charges. Valid or fraud charges. With the new P-card portal, charges should be matched one to one. Reminder, don't authorize payment until you have received the product.

Question: When should I authorize payment on a PO?

Answer: Payment should be authorized when the product/service is received/delivered.

Question: Can I authorize payment for a P-card purchase before the product is delivered?

Answer: Payment should be authorized after the product is delivered because the vendor could cancel your order. You could also have a different amount charged that would need to be addressed.

Question: What is the attach file link for on the initiate tab?

Answer: The attach file link on the initiate tab is for quotes or other documentation that Procurement needs for the requestion to be approved. Most State of Utah or other contracts the county uses require the vendor to provide a quote. The quote needs to be attached to the request.

Question: Can the vendor id# be updated to a different vendor once the PO is approved?

Answer: The vendor id# can be updated by purchasing. You will need to email us the information to update.

Question: What is the best way to track all the PO requests and approved POs?

Answer: The work in progress screen shows the status of entered PO requests. If you need to track approved POs, you can do a search in the Advance Search option at the bottom of Parameters for search tab. Some users track approved POs with a spreadsheet.

Less-Lethal Munitions

Ryan Reeder, State Contract Analyst

The Utah Division of Purchasing recently established 2 Statewide Cooperative Contracts for Less-Lethal Munitions. (MA4000 & MA4001) Less than Lethal Munitions, such as rubber bullets and pepper projectiles, are in regular use by law enforcement agencies throughout the United States in an effort to provide public safety while also attempting to limit the escalation of conflict where lethal force is prohibited or undesirable. Law enforcement and other similar entities periodically encounter these situations where less-lethal munitions can be used as an essential tool when trying to use the least amount of force necessary to accomplish a goal.

In the past, there was only one option available on statewide contract for less-lethal munitions. Currently there are two statewide contracts with 3 different brands for end users to pick from. These newly solicited contracts both offer a wide array of less-lethal munitions and include discount pricing for end users. The discount pricing percentage will vary based on the item but the contracts were set up with end users' needs in mind. In addition to the less lethal projectiles, Less Lethal Launchers and other Less Lethal Components can be accessed within the contract. Components include full kits, holsters, magazines and wraps among other things. Agencies are invited to review the contracts and determine the best value options for their organizations. When ordering, please identify the agency you represent and always include the state contract number.

Why are solicitations Posted Publicly?



Jeff Hammer, State Purchasing Agent

Why Solicitations are posted publicly is answered in the Utah Procurement Code (63G-6a-102) and Utah County Purchasing Procurement rules and regulations (3-104 Public Notice). The purpose of the Utah Procurement Code is to ensure transparency in the public procurement process; ensure fair and equitable treatment of all persons who participate in the public procurement process; provide increased economy in state procurement activities and foster effective broad-based competition within the free enterprise system.

Due to this requirement, many solicitations require public notice. The procurement unit that issues a solicitation shall post notice of the solicitation: on a website that is owned, managed by or provided under contract with, the division for posting public procurement notices or on the main website for the issuing procurement unit. When working with the Division of Purchasing, public notice is posted on a e-procurement system called Utah Public Procurement Place (“U3P”). Public notice requires posting for a minimum of seven days. It is possible that an issuing procurement unit may reduce the seven-day period if the procurement unit’s procurement official signs a written statement that states a shorter time is needed and determines that competition from multiple sources may be obtained within a shorter time frame (63G-6a-112).

Even though the required notice is seven days, many solicitations are posted for longer than the required period. A longer period may be advised in order to obtain better responses and more competition, which ties back to the purpose of the Utah Procurement Code. To allow offerors a reasonable amount of time to read and respond to a solicitation, Purchasing may recommend a longer time period for complex solicitations. If you have questions about an appropriate posting time, you can reach out to the Division of Purchasing who will gladly assist you.

Sensitive Data



The sensitive data setting is to be used when you need to meet compliance with HIPPA or other regulatory requirements. Purchasing has seen more requests with sensitive data marked for items that do not need to be marked as such. E.g., chairs, office supplies, and other ordinary everyday items. Take time to evaluate if what you are procuring needs to be marked sensitive data.

You can update your setting by clicking on File within the menu bar, select User preference. It is recommended to have this set to NO as default, unless you work with HIPPA or other regulations that require this to be marked YES. If you mark YES, review each PO request to see if YES should be marked for what is being obtained.

Monthly open Procurement chat

Based on feedback, purchasing will be hosting a monthly open Q&A. This is a time for you to ask questions you have related to purchasing and the process. The open discussion will last no more than an hour in the County Administration building Auditor conference room 3614. An email will be sent out with more information on dates and time. If it would be easier for us to chat in your department, let us know and we will come to you.