Process Documentation Mapping

By Kaitee Hall, Purchasing Agent

It may not be glitzy, it may not be glamorous, but it sure is important... it’s process mapping!

Having processes documented provides us with many strengths: it allows us to be prepared for turnover and succession planning; it helps us remember the “why” of past business decisions; and it helps us to document every step and aspect of our jobs at each level, from the most specific to the most general.

One manner of process mapping is Total Quality Management (TQM), which at its most basic level uses the following key:

Rectangles, meaning activities – This is the main building block and the simplest element of your process map. It’s an activity. You can make a process map for anything you do, so a rectangle can be anything from corresponding with a colleague, to filing a report, to completing a form, etc.

Arrows, with optional text to indicate inputs and outputs – The text next to arrows (optional) end up being the result or output of an activity. Arrows connect activities and help the viewer through the chart.

Diamonds, symbolizing decision points – Whenever you’re talking about a process and the answer to “what do we do next?” is “it depends,” a diamond is likely to show up in the...
process map. It will denote a question, the answer to which will result in a fork in the process.

**Terminator symbol, looks like an oval.** — Denotes the end of the process.

Let’s run a simple example — repairing a broken lamp — as seen to the right.

This notation of process mapping gives you the basic building blocks and further symbols are used in TQM as processes grow more complex. This will allow you to easily document and read documented processes, facilitating work in your office in many ways.

Please contact Kaitee Hall, kaiteehall@utah.gov for more information.

### Digital Print and Quick Copy Services

*By Cat Turner, Contact Analyst*

When you need to print curriculum, learning guides, or any development material, don’t forget about the Office Depot contract, PD2454, for Digital Print and Quick Copy Services. Whether you have your format ready to go or not, Office Depot can assist you with formatting and putting together a useful, functional educational program that meets all Utah Core Standards.

You can pick different types and sizes of paper, covers, and colors depending on your needs and audience.

Printings can be scheduled at whatever interval is most convenient for you whether that be by semester, quarter, or during scheduled breaks. Average turn times are 3-5 days, occasionally longer during peak BTS time July-August.

The contract includes discounted pricing on printing, binding, laminating, large format and NCR.

Contracted pricing averages 70% off of retail!

You can print online through your Office Depot account or by going into any conveniently located store. If you ever do need to purchase in store, please make sure to set up your account in advance. This can be completed by contacting the contract manager identified on the statewide cooperative contract website. For more questions, please contact Cat Turner, caturner@utah.gov.
Did I get your attention? Ok, this article is not an emergency, but that is the topic we will be discussing. What is an Emergency Procurement, and when can I use it? We can find an explanation of Emergency Procurements in the Utah Procurement Code 63G-6a-803: (paraphrasing) “a procurement unit may engage in an emergency procurement without using a standard procurement process if the procurement is necessary to:

a) avoid a lapse in a critical government service;

b) mitigate a circumstance that is likely to have a negative impact on public health, safety, welfare, or property; or

c) protect the legal interests of a public entity.”

Who is authorized to determine if any of the above are true then? This is all determined through the delegated authority of the CPO, to the head of a procurement unit. In general language, the Executive Director of your Department, or anyone that the Executive Director of the Department has delegated the authority to in writing, would be the one to determine if the situation is an emergency or not. Keep in mind, that State Purchasing will not advise you on if your situation is deemed an emergency or not; your Department’s Executive Director or the Designee must make the determination. After the emergency has been abated, the agency must prepare a written documentation explaining the emergency condition and why it was necessary to purchase though using an Emergency Procurement. This documentation will need to be approved or signed by the Executive Director or the designee with that delegated CPO authority. (See 63G-6a-803(2)(b) and Rule R33-8-401 (6). )

What IS an Emergency, but not limited to:

- damage to a facility or infrastructure resulting from flood, fire, earthquake, storm, or explosion;
- failure or eminent failure of a public building, equipment, road, bridge or utility;
- events that impair the ability of a public entity to function or perform required services; or
- situations that may cause harm or injury to life or property from flood, fire, earthquake, storm, or explosion

What is NOT an Emergency:

- failure to follow a Standard Procurement Process before an existing contract is about to expire;
- failure to follow a Standard Procurement of any kind;
- limited time offer that needs to be purchased today or else we lose “the good Black Friday deal”; or
- we didn’t want to use State Purchasing so we just bought it and called it an “emergency”.

Even if the Executive Director or the designee determines it is an emergency, you should still try and use all efforts to get quotes, and or use State Contracts that may already be in place. (Rule R33-8-401 (5)). A reasonable time should be allowed for all vendors to provide quotes for the emergency which will save the tax payer dollars.

I hope you all take these thought and ideas into mind, and hope that you never have to deal with an emergency. But if you do, now you know how to handle it. Good luck, and stay safe.
FINET: Canceled or Refunded Checked

By Tara Eutsler, Contact Analyst

This is part four of a four-part series to help State Agencies understand contract issues that are outside the normal FINET process.

Has your agency make a payment to a contracted vendor* and then had to cancel the check because there was an error? Or has a vendor refunded money the agency paid through an agency contract? When either of these situations occur, the available funds do not automatically get returned to the contract. The decreased available funds on the agency’s contract may mean insufficient funds to complete payments required by the contract’s scope of work. When a check is canceled or refunded, an agency needs the funds to be returned to the contract. Don’t worry, the Utah Division of Purchasing has a process for this.

The Agency begins the process. First, download the FINET Request—Canceled Check or Check Refunded form from the State’s Purchasing Forms webpage. The document is located in the “Contracts, Amendments, Purchase Orders” tab. Next, review the form to determine the documentation that must be gathered including the original invoice, the PRC, and a copy of the warrant cancellation form, if applicable. Gather any other information that verifies the money was returned. Then, review the documentation and answer all of the questions on the above mentioned form. Finally, send the form and documentation in one PDF to purchasingcontracts@utah.gov.

The process moves to the Utah Division of Purchasing. The Coordinator receives the request and assigns it to a State Purchasing Agent. The Agent reviews the documentation and may call the agency for clarification. When a positive review is complete, the Purchasing Agent approves the request. He or she then asks the Coordinator to increase the available funds in the contract by the amount that was returned to the State or by the amount of the canceled check. For transparency, a new process requires the Coordinator to upload the documentation to the contract in FINET. Finally, the agency receives an email stating that the process was approved and completed.

Once the agency stores the documentation, the process is complete.

When a check against an agency contract is canceled or a refund from a vendor needs to be applied to the contract, don’t worry. Follow the process above and, in most cases, the Utah Division of Purchasing can solve the problem.

* The process described in this article is specific to agency contracts processed through the Utah Division of Purchasing. The process is not required for State Cooperative Contracts. Similar issues with Purchase Orders should be directed to the Purchasing Agent Liaison assigned to your Department.
The Division of Purchasing is currently looking for sourcing team and evaluation committee members! The following contract portfolios are currently in the solicitation process and your input would be a welcome help to ensuring effective contracts are put in place to support your agency's needs! Contact the identified contract manager with any questions!

<table>
<thead>
<tr>
<th>TITLE</th>
<th>NAME</th>
<th>CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elevator Maintenance and Repair Services</td>
<td>Blake Porter</td>
<td><a href="mailto:borter@utah.gov">borter@utah.gov</a></td>
</tr>
<tr>
<td>Chatbot (Virtual Assistant) Software Solution</td>
<td>Solomon Kingston</td>
<td><a href="mailto:skingston@utah.gov">skingston@utah.gov</a></td>
</tr>
<tr>
<td>Water Flow Treatment Equipment and Products.</td>
<td>Cherilyn Hess</td>
<td><a href="mailto:chess@utah.gov">chess@utah.gov</a></td>
</tr>
<tr>
<td>Variable Frequency Drives Statewide</td>
<td>Thinh Doan</td>
<td><a href="mailto:tqdoan@utah.gov">tqdoan@utah.gov</a></td>
</tr>
<tr>
<td>Pest Control Services Statewide</td>
<td>Thinh Doan</td>
<td><a href="mailto:tqdoan@utah.gov">tqdoan@utah.gov</a></td>
</tr>
<tr>
<td>Vape Detector and Elevated Sound Detector</td>
<td>David Bundy</td>
<td><a href="mailto:davidbundy@utah.gov">davidbundy@utah.gov</a></td>
</tr>
<tr>
<td>School Wood Shop Lumber &amp; Supplies</td>
<td>Garret Johnston</td>
<td><a href="mailto:gkjohnston@utah.gov">gkjohnston@utah.gov</a></td>
</tr>
<tr>
<td>School Athletics Equip. Uniforms &amp; Performance Clothing</td>
<td>Garret Johnston</td>
<td><a href="mailto:gkjohnston@utah.gov">gkjohnston@utah.gov</a></td>
</tr>
<tr>
<td>School Graduation Supplies - Class Rings - Champ Rings</td>
<td>Garret Johnston</td>
<td><a href="mailto:gkjohnston@utah.gov">gkjohnston@utah.gov</a></td>
</tr>
<tr>
<td>Window Cleaning Service</td>
<td>Angela Carlisle</td>
<td><a href="mailto:acarlisle@utah.gov">acarlisle@utah.gov</a></td>
</tr>
</tbody>
</table>
Purchasing Update

Purchasing Team Survey

By Cat Turner, Contact Analyst

Who is as excited as I am for the next James Bond? Although, it looks like some at the Division of Purchasing would prefer a different actor to play Bond!

Who is Purchasing’s Favorite James Bond?

With the Olympics coming up next year, we thought we would ask a critical question, which Olympic Games does the Division of Purchasing prefer to watch or not watch in some instances.

With the Olympics coming up next year, we thought we would ask a critical question, which Olympic Games does the Division of Purchasing prefer to watch or not watch in some instances.

PREFERRED OLYMPIC GAMES TO WATCH

<table>
<thead>
<tr>
<th>Summer Olympics</th>
<th>Winter Olympics</th>
<th>Neither!!</th>
</tr>
</thead>
<tbody>
<tr>
<td>48%</td>
<td>38%</td>
<td>14%</td>
</tr>
</tbody>
</table>

With the Olympics coming up next year, we thought we would ask a critical question, which Olympic Games does the Division of Purchasing prefer to watch or not watch in some instances.

How is Purchasing’s favorite Utah National Park?

There’s nothing like getting out in Utah’s National Parks. Just talking about the parks, makes me wish summer was here!

How to Receive the Purchasing Update Newsletter

Did you receive this newsletter from a co-worker? Do you want to receive the Purchasing Update directly? Please send an email to Tara Eutsler, teutsler@utah.gov.