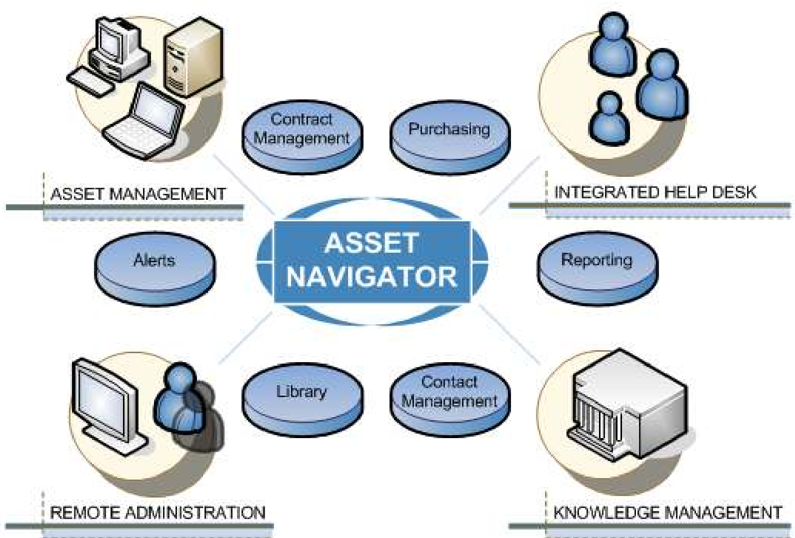
Catholic Health Initiatives
TEAMNet User Manual

Capital Request System (CRS)



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CATHOLIC HEALTH INITIATIVES®

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Program Overview:

The TEAMNet Capital Request System (CRS) is an internet based capital needs management system. Use of this tool enables facility staff to document and process capital expenditure and to manage that process from initiation to purchase. A capital expenditure can be entered and the details stored and supplemented with related documents. When ready to proceed, the system provides a means to store additional information including quotes, provides an electronic review workflow, and finally; transfers the approved, funded and released capital request to the CHI Connect interface for requisition processing and purchase order issuance.

Managers can view the aggregated needs list and monitor the process of specific requests. The system lists all capital need recorded by an MBO for managements use prioritization and alignment with strategic initiatives. The system provides electronic review processing and notifications and automates the interface for submitting the requisition with the CHI Connect system for PO issuance. This system also categorizes capital needs the Catholic Health Initiatives may use to identify potential purchase bundling opportunities to achieve better terms and pricing from the vendor community.

Components of CRS:

1. Security
    a. Login is required to access all TEAMNet and CRS functions. Each user is provided a profile enabling a specific set of functions within TEAM. The profile consists of two elements:

Note: (see chapter 2 of TEAMNet Users manual for detail instructions to become a registered user.

i. Facility Access – determines which facilities information a user can view or access. Users with responsibility for more than one location can view information for multiple locations.

ii. Roles (also referred to as Groups) – determines which modules of TEAMNet appear in the application header and which functions a user is permitted to perform within the assigned modules. CRS has three roles:
    1. Capital Users – Basic user access enabling the creation of a request, the adding of notes and documents.
    2. Capital Recommit – advanced access enabling a rejected request to be transferred to CHI Connect an additional time. This is necessary to complete the purchase order process if the CHI Connect import routine fails. This role is usually reserved for a Material Manager or Finance staff member
    3. Capital Admin – Reserved for CHI National Staff. Enables the adding and editing of facility project information used in the CRS module, the facility workflow process, and the editing of facility vendor contact data. This role also manages the key item description list, the group buy contract schedule, and the national vendor contact data.

iii. In addition to the profile, the CRS system uses a workflow list to control the capital request process to ensure the completion of predetermined review and approval processing before enabling next steps to be accomplished.

1. Capital Request entered

    b. Records & classifies the capital request. This includes basic data elements such as key item description, vendors under consideration, budgeted amount, priority, fiscal period, funding source, and others.

2. Collaborative Information

    c. Quotations, spreadsheets, plans, brochures and other document types added and stored for review.

3. Review Workflow

    d. A predetermined review workflow ensures that stakeholders are involved in the process. By putting the workflow online, users can view who has and who has not reviewed the request to facilitate processing.

4. Request transfer to CHI Connect
    e. Once the review is completed and funded, the request is sent to a transport mechanism for import into CHI Connect to be processed as a capital requisition and purchase order issuance.

Basic CRS Process:

1. Request Created and quote information is entered
    a. Quotes solicited from vendors. At least one is required. The system will accommodate several vendors for consideration on each request.
    b. Key stakeholders and support function teams are brought in to collaborate and coordinate planning, preparation, installation and service support activities as needed.
    c. Quotes received and refined as needed
    d. Quotes marked completed
    e. When ready to make selection, one quote is Awarded
2. Request Submitted
    a. Quote reviewed for completeness and accuracy
    b. Typically this role is performed by Material Manager or designate
    c. Submitted to begin review workflow
3. Review Process begins
    a. Capital Diligence – contract compliance & pricing
    b. Functional Area Reviews – support stakeholder sign-off
4. Funds Committed – Lawson financial information is entered
5. Funds & Request released
6. Request information exported and transferred to CHI Connect for requisition processing and purchase order issuance

Capital User:

This is the user dashboard for the Capital Request System (figure 1). This screen displays active requests that the user has both: a) a **role** with reviewing or processing **and** b) that has been '**Submitted**' which initiates the review workflow.

Basic filters enable the user to limit the records presented in the display listing. The **Search** tab and the Search menu selection in the blue navigation bar present additional filtering options.

Figure 1 – User Dashboard

Menu Selection Descriptions (Blue Navigation Bar):

My Inbox – user dashboard (contains two tabs)

Inbox tab – list of requests filtered by bullet selection

- Capital Involving My Participation – (default) presents list of all capital requests for which the user has a reviewer role
    - Note: Requests with a status of 'Entered' do not appear in the grid.
- Due by Me Now – filters list to those requests requiring review or processing action by user
- Status pick-list – Select one or multiple statuses to filter the displayed listing (Figure 2)

Search tab – presents additional search criteria screen

Search – opens detailed search criteria screen

New Capital – opens screen to initiate a request

Reports – presents list of available reports

Admin – not present for all users – opens admin screen for managing system tables

Tech Assessment – provides list of Clinical Engineering (CE) equipment with category scoring from Technology Assessment

My Inbox Menu Selection

To Find an Existing Capital Request:

The grid displays all requests for:

- Capital Involving My Participation
- Due By Me Now
- Status

Note: requests with a status of entered will not appear in the Inbox grid listing. The review process assignments are not made until the request is submitted so the reviewer and process roles are not yet identified.

Figure 2 – Find Existing Capital

Column Descriptions:

ID – System generated ID assigned to capital request upon request creation (Click to sort ascending or descending)

Facility – Clinical Engineering Facility Code assigned to each facility

CV/FP/GB – Visual indicator of compliance for the request to the following categories:

- Contracted Vendor (CV): Selected vendor is a HealthTrust Purchasing Group (HPG) vendor:
    - Green – HPG vendor selected
    - Red – HPG vendor available but not selected
    - Yellow – No HPG vendor available

- Fair Price (FP): Capital Equipment diligence review will determine if the pricing is consistent with or better than the HPG or best known pricing given the volume and terms offered.
    - Green – Equal to or better than HPG or best known pricing
    - Red – Exceeds HPG or best known pricing
    - Yellow – No known comparative data (may require local legal review)

- Group Buy (GB): Indicates that purchase is made as part of an available Group Buy within the fiscal year.
    - Green – Group Buy participant
    - Red – Elected not to participate in available Group Buy opportunity
    - Yellow – No Group Buy available

Item/Model# - Key item description and model (if entered) of request item (Click to sort ascending or descending)

Status – Process progress indicator:

Entered (white)
Submitted (red)
Sign Off Completed
Committed
Rejected (black)
Approved
Lawson Requisition (red)
Capital Purchased

Attach – Paperclip icon & number indicating the number of documents or files attached to the request

Fiscal – Quarter and fiscal year of the anticipated or desired expenditure

Purchase By – Date required for order placement

Vendor - Vendor choice for purchase (Click to sort ascending or descending)

Amount – Quoted cost if entered after quote acceptance

Search Menu Selection

The Search Menu Selection offers several fields enabling the user to filter requests of interest. Users may enter as few or as many criteria needed to filter the list of requests in the grid at the bottom of the page. Search criteria can be saved for use at a later time. The grid at the bottom of the page lists items matching the criteria entered. The results can be exported in several formats including .pdf, .xls, or .csv formats. (Figure 3)

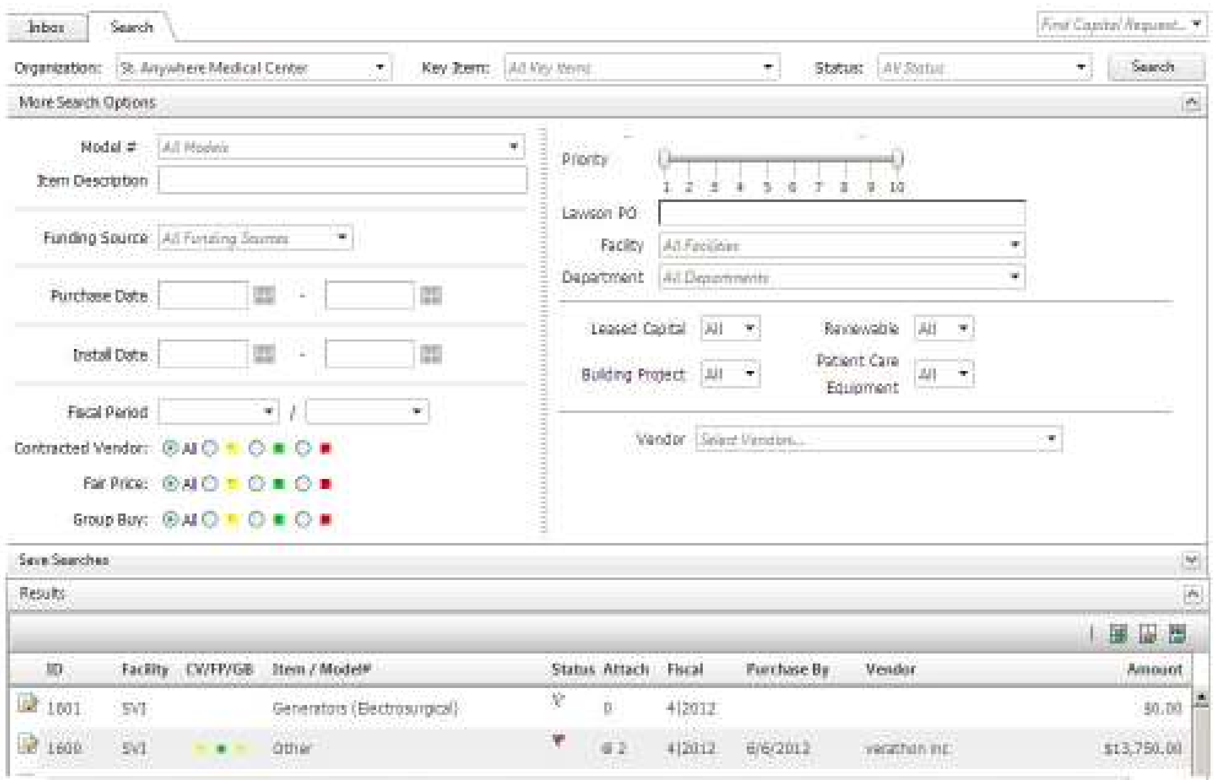


Figure 3 - Search

Note: click on the section hide icon to hide or the section unhide icon to reveal section details.

Figure 4 – Search Section Hide

Users can create and save search criteria templates for recall and use at a later time. Enter to search criteria and a name for the template before clicking on the Save/Update button. Customized search templates are user specific and only available to the user who created them. Previously saved search criteria can be recalled by clicking on the folder next to the assigned search template name listed on the right side above the grid. Search templates that are no longer needed can be deleted by clicking on the trash can to the right of the template name. Once a template is deleted it is no longer available and cannot be recalled.

Basic Search Criteria:

These options are located in the first row of the “Search” tab:

Organization – Pull down for selecting MBO

Key Item – Pull down to select from inputted requested items.

Status (pull down) – The current process stage of the request: Entered, Submitted, Capital Reviewed, Sign Offs, Committed, Rejected, Lawson Requisition, Purchased

Search (Button) – Initiates search from selected criteria

Find Capital Request– List of request numbers. Users can enter a known system assigned request ID from the presented list.

More Search Options:

**** When carrot pull-down option enabled***

Model # - List of all previously created model numbers and descriptions in the system. Users can enter either a model number or a description to filter the list by those criteria. The presented list is dynamically filtered to match entered text.

Item Description – Free text field for item description. Search will find any descriptions containing the entered text. Note: This is not an exact search.

Priority – Select the range of priorities by moving the left and right sliders to create a range within which to search (1 is highest and 10 is lowest).

Funding Source – Select one or more funding source(s) by checking the box to the left.

Lawson PO – Search by PO for completed request

Facility (MBO's with multiple facilities) – Search by Facility

Department – Search by corresponding Facility Department

These 4 options utilize an All/Yes/No pull down selection:

- **Leased Capital** – indicates request item will be financed through a lease
- **Building Project** – indicated request item is part of a building project
- **Reviewable** – indicates unit exceeds reviewable capital threshold of the facility
- **Patient Care Equipment**– Indicates request is for a medical device

Vendor – List of all vendors in the system. Users can enter either enter a vendor to filter the list by those criteria or select from the pull down menu. The presented list is dynamically filtered to match entered text.

Purchase Date – Enter the range of the purchase date desired. Only one date is necessary. The results will include the lower and upper dates entered. Users can either enter the date or select the date from the popup calendar. If the right date is blank, system assumes through today. If the left date is blank, system includes earliest entered request.

Install Date - Enter the range of the purchase date desired. Only one date is necessary. The results will include the lower and upper dates entered. Users can either enter the date or select the date from the popup calendar. If the right date is blank, system assumes through today. If the left date is blank, system includes earliest entered request.

Fiscal Period – Select quarter in the left field then year in the right field of desired fiscal period.

Contracted Vendor/Fair Price/Group Buy – Select compliance criteria as defined:

- Contracted Vendor (CV): Selected vendor is a HealthTrust Purchasing Group (HPG) vendor
- Fair Price (FP): CHI Integrated Supply Chain diligence review to determine if the pricing is consistent with or better than the HPG or best known pricing given the volumes and terms offered
- Group Buy (GB): Indicates that purchase is made as part of an available Group Buy within the fiscal year

Displayed Searches:

The results grid displays a list of requests matching search criteria. The fields displayed are the same fields presented on the "Inbox" tab. Clicking on the "Paper and Pencil" icon will open that specific request. Can sort ascending to descending, descending to ascending by clicking on ID, Item/Model# or Vendor.

Figure 5 – Displayed Search

New Capital Menu Selection

The New Capital Menu Selection is how a new capital request is created. Enter the preliminary information including:

- Facility
- Department
- Project (Optional)
- Key Item
- Item Description
- Fiscal Period

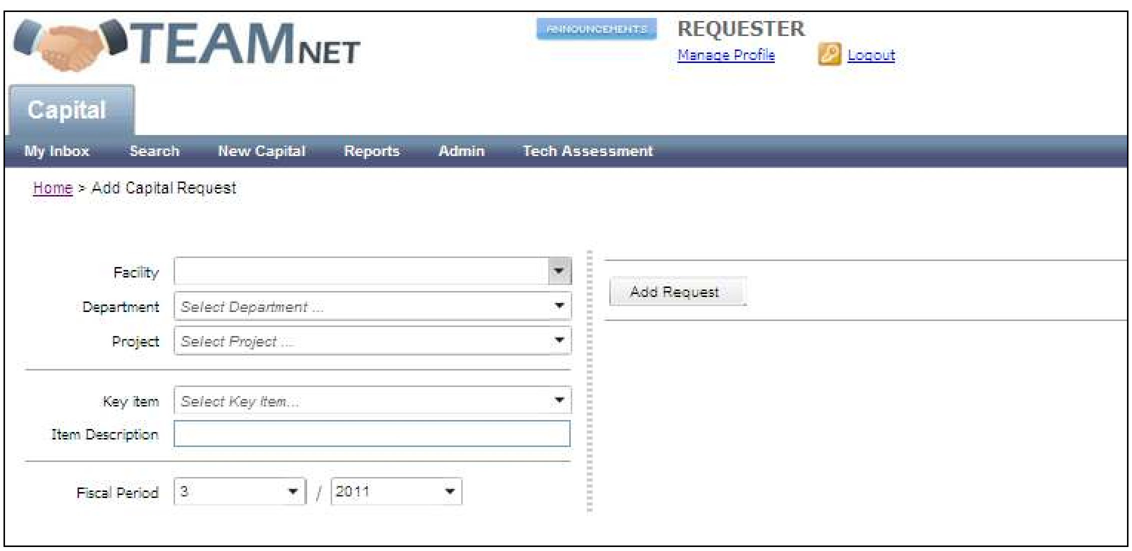


Figure 6 – Add Capital Request

Facility – Select facility from list. Users only presented with facilities assigned. The list can be filtered by entering a partial facility name.

Department – Select department from list. The list can be filtered by entering a partial department name.

Project – (Optional) Select from projects created for this facility by local administrator.

Key Item – Select best fit from the key item list. Key item is for general classification purposes only. The list can be filtered by entering a partial item name. If Key Item is not available enter "<u>other</u>" and request a new key item description to be created by Capital Program Operations staff.

Item Description – The item description fills in when the Key Item is selected. This field may be overwritten by the user to provide additional clarity.

Fiscal Period - Select the quarter (left box) and year (right box) for the anticipated fiscal period of the expenditure.

Click "Add Request" button to create request. The request status will be "Entered."

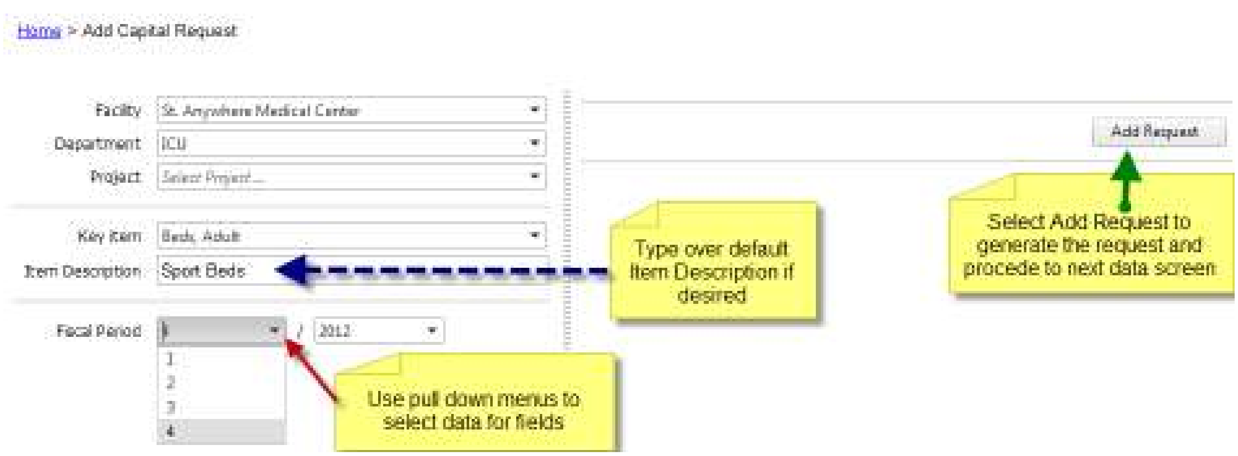


Figure 7 – Add Capital Request

If any required fields are not completed, an error message will appear upon clicking "Add Request." If there are multiple errors, the system displays the first encountered. All errors must be resolved before proceeding.

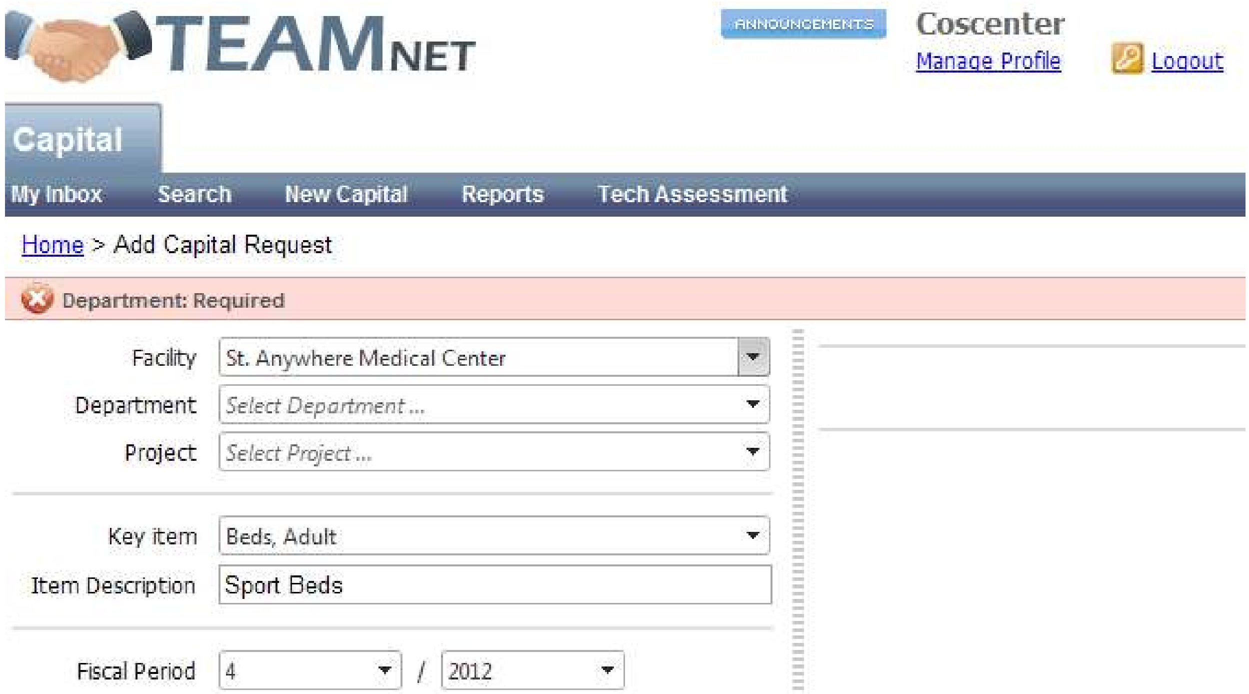


Figure 8 – Add Capital Request Error

After creating the request item, enter capital request detail. (Figure 9)

Enter Capital Request Detail:

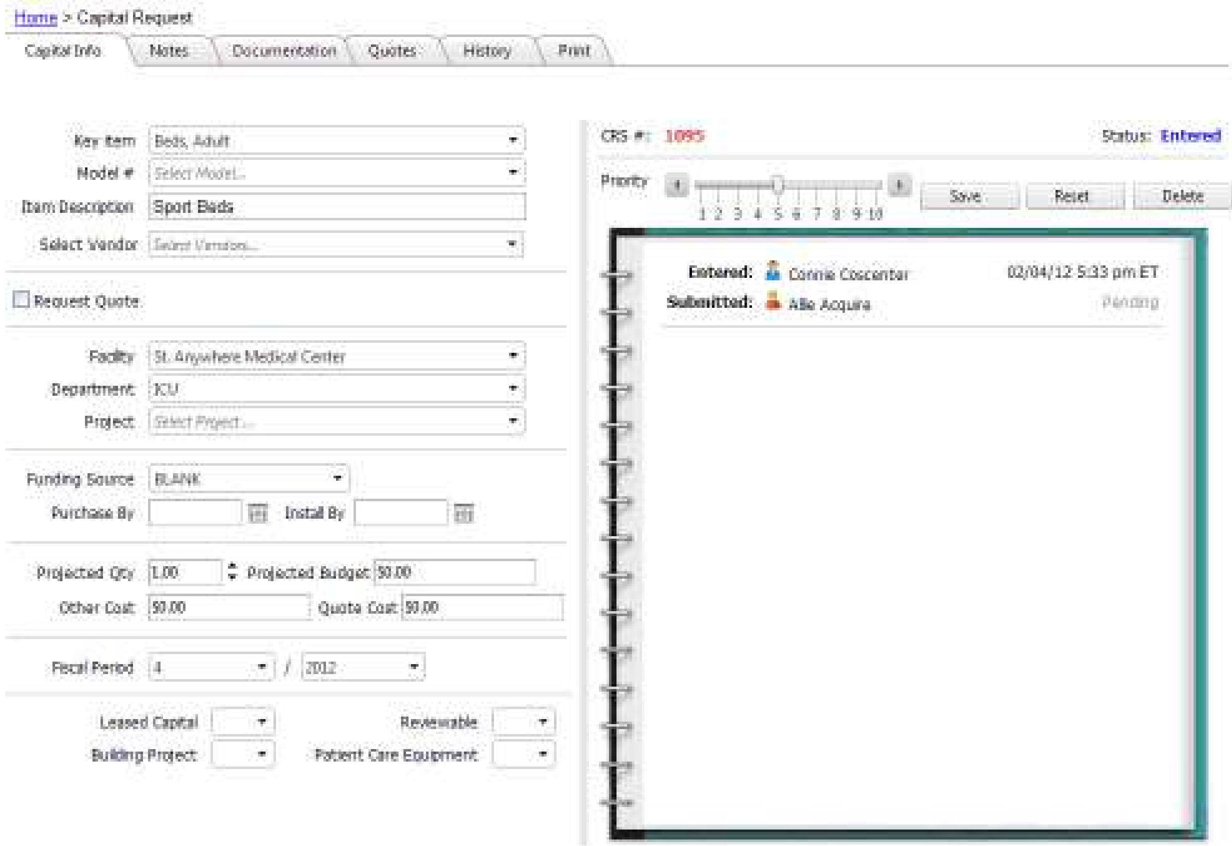


Figure 9 – Capital Request Detail

Model #– Enter the model when known (Optional)

Select Vendors - Select by two methods:

- Click the down arrow to reveal the vendor list. HPG contracted vendors will appear at the top of the list. Click on each vendor to be considered in the selection process.
- The dynamic drop down will be filtered to vendors matching the text entered into the field as well as all HPG contract vendors for the item description.

Click the down arrow to reveal a list of contract vendors and any matching the text entered in the field.

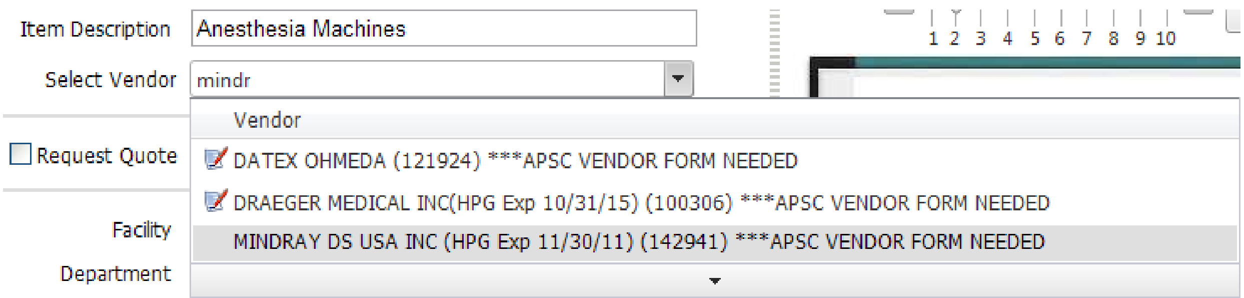


Figure 10 – Select Vendor

If the vendor field is blank, the list displayed shows HPG contracted vendors, followed by the entire list of vendors in numeric-alpha order. The grid is not capable of displaying the complete list of vendors. Pre-filtering for non-HPG vendors is recommended.

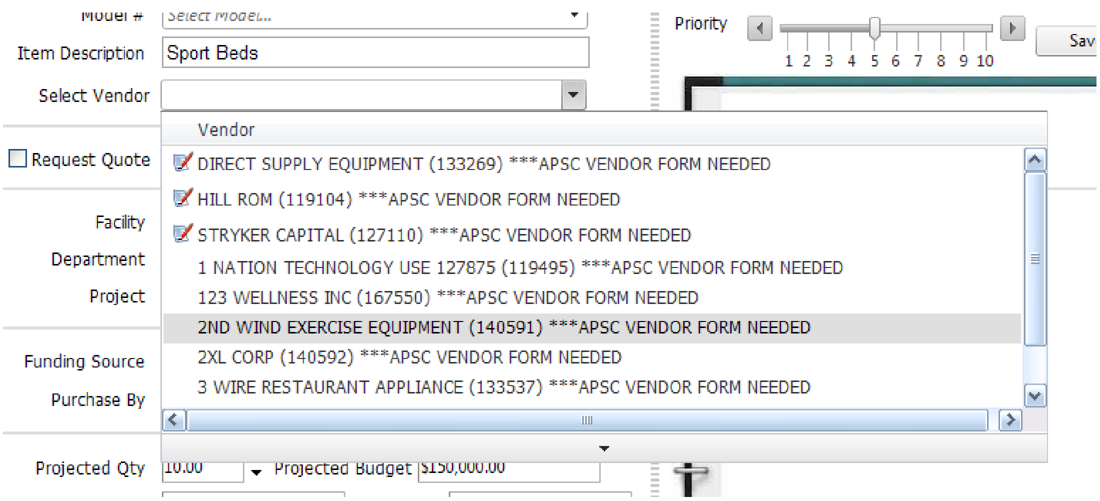


Figure 11 – Select Vendor

"*** APSC Vendor Form Needed" appears following vendor name informs the user that this "Vendor Purchase From" is not associated with this facility. Please complete and submit the APSC form at this time to avoid delays with the request process (see appendix A). If the desired vendor is not listed, complete and submit the ASPC form to get the vendor added first to Lawson, and then into the CRS system.

Request Quote – For future use.

Facility, Department, Project – Completed when request added
Funding Source – Select funding source from list

Purchase By – Enter last date purchase order can be placed to meet installation requirements

Install By – Enter date for receipt or installation completion (Note: Install By Date must be equal to or greater than the Purchase By date)

Quantity – Number of units to be purchased

Projected Budget – Estimated total cost

Other Cost – Cost of ancillary expenses (i.e., shipping, manuals, accessories, installation)

Quote Cost – Auto-populated from the awarded quote

Fiscal Period – Select period when purchase required

Select "Yes" or "No" for the following fields

- **Leased Capital** –Item to be leased
- **Building Project** – Part of a building project or Master Facility Plan (MFP)
- **Reviewable** – The total cost exceed the threshold for CHI reviewable capital
- **Patient Care Equipment** – Medical Device

Priority - Assign the priority by moving the slider (1 is highest and 10 is lowest). This selection is the facilities discretion

Function Buttons:

There are three function buttons:

- Save
- Reset
- Delete

Save - The Save button will store and retain all changes. A green bar appears if there are no data validation errors and the data is successfully stored.

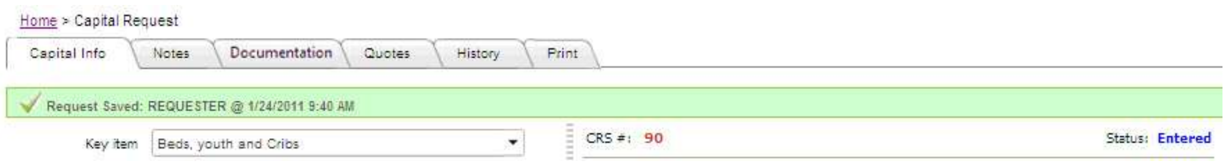


Figure 12 – Save Request

A red information bar indicates a data validation error. The data element requiring attention will be displayed within the red bar.

Reset - The Reset button discards any changes and sets the data in all fields back to the previous successful save.

Delete – The Delete button will remove the item entirely from the CRS list. This action is permanent so a confirmation message is presented. Select OK to confirm your choice to delete the record (Figure 13).

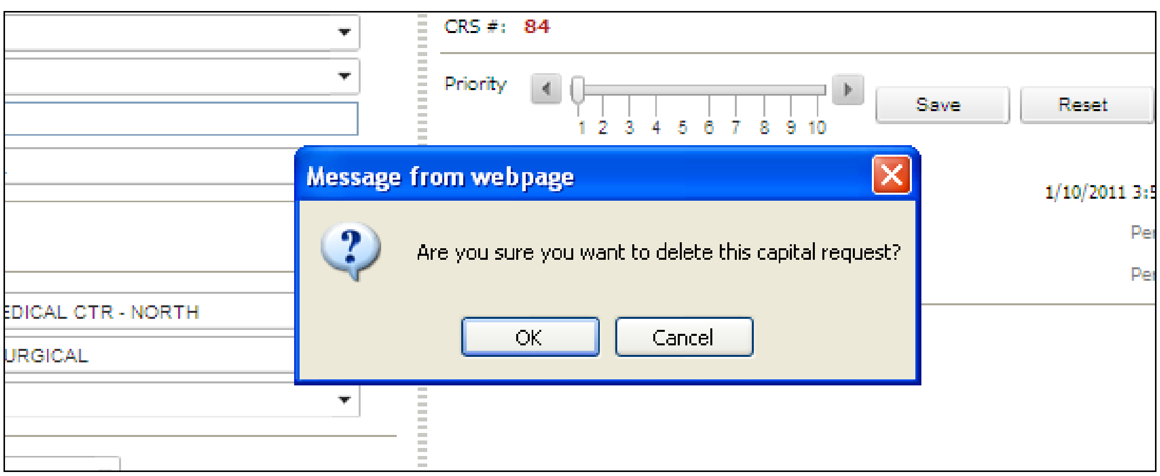


Figure 13 – Delete Request

After creating capital request detail, enter vendor information and quotes.

Enter Vendor Information and Quotes:

Below the blue navigation bar will be six tabs:

- Capital Info (CRS #)
- Notes
- Documentation
- Quotes
- History
- Print

Capital Info Tab

The capital info tab contains the capital request detail.

When any other tab is active, the Capital Info tab updates to display the CRS #.

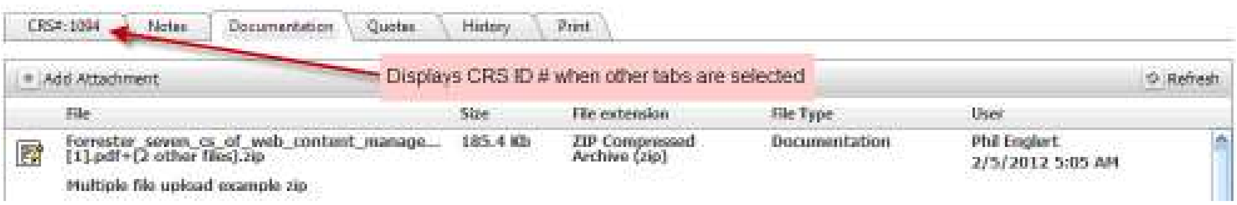


Figure 14 – Capital Info Tab

Notes Tab

The notes tab provides an informal informational and collaborative space for users to document relevant information not captured in data fields or to provide additional details and comments.
A list of notes is displayed in the note tab. Any note can be flagged "red" by any user for review. If the notification system is turned on for the facility, the system will send an email notice to all participants in the review process for this request informing them that a note has been flagged.

Figure 15 – Notes Tab

Notes can be marked 'Notify All Participants.' Checking this box will send an email to all participants in the review work-list which signals others that this note warrants attention.

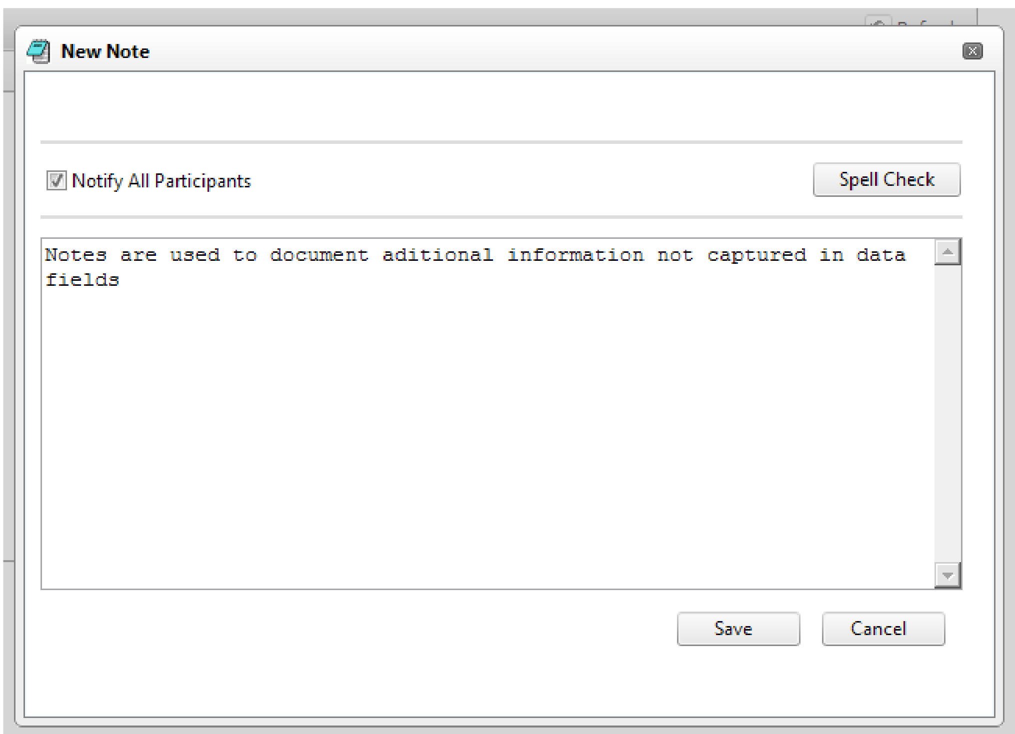


Figure 16 – Enter Note

The notepad also has spell check capability. This is a standard Microsoft spell check sub-application similar to other spell check applications. Users can choose from a suggestion list by highlighting the correctly spelled word and clicking the Change button.

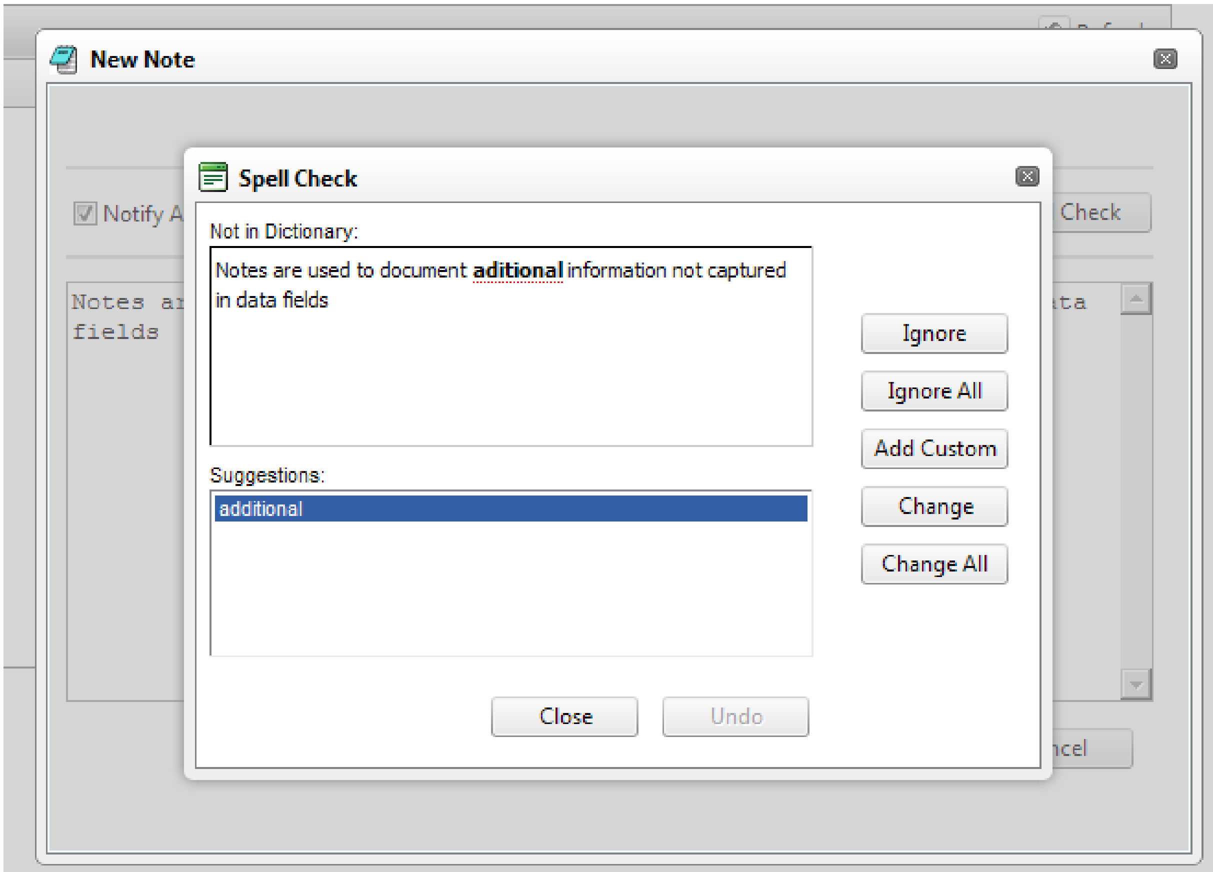


Figure 17 - Note Spell Check

Users can also elect to 'Ignore' the misspelling in their own note or add the perceived misspelled word to the dictionary by choosing 'Add Custom'.

Note: One word of caution; the dictionary serves everyone who uses the application across the system. Adding misspelled words will prevent the spell checker from identifying the misspelled word for everyone else.

If a user is not absolutely sure of the correct spelling, please choose ignore. With that said, healthcare has many specialized words that are not found in a standard dictionary. Adding correctly spelled words will assist all users in the organization.

Documentation Tab

The documentation tab allows for the upload and storage of additional electronic files. The system will accept most files types including document files types such as .doc, .xls, .txt, .csv, and .pdf; as well as image files types like .tif, .gif, and .bmp. Only .pdf files can be viewed within the system if Adobe Reader or Acrobat is the default viewer for those file types. All other file types must be downloaded and viewed on the local machine.

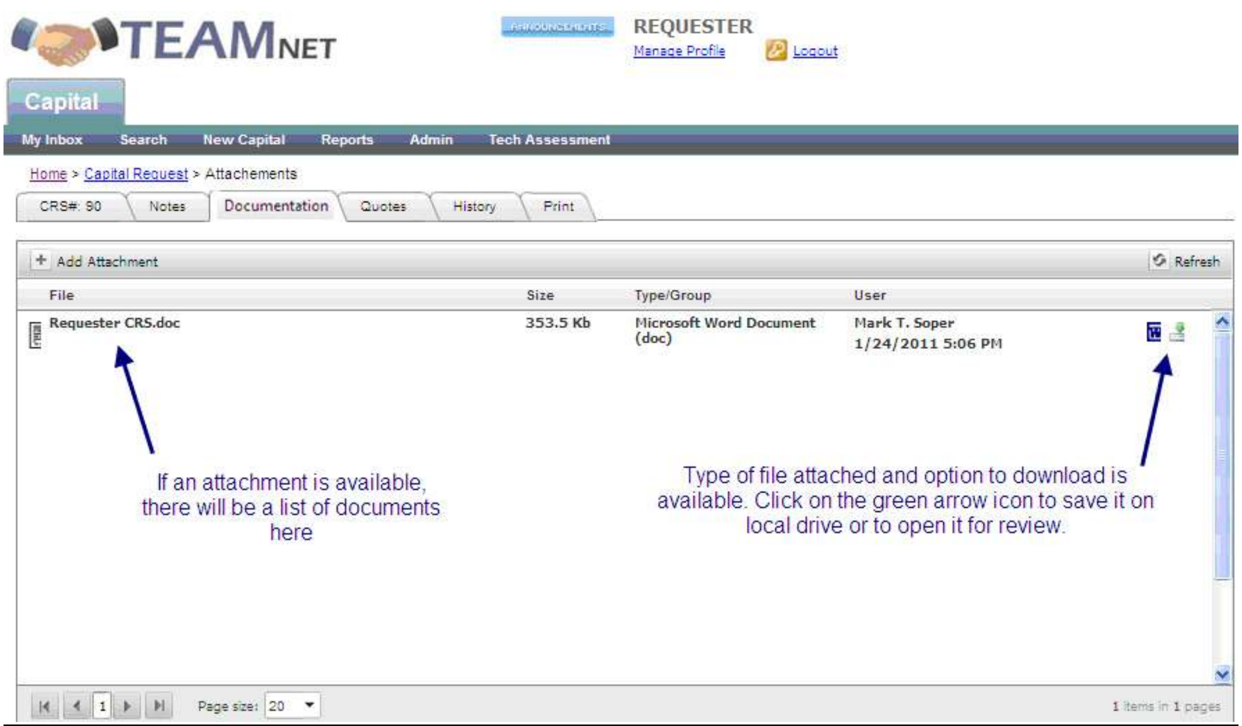


Figure 18 – Documentation Tab

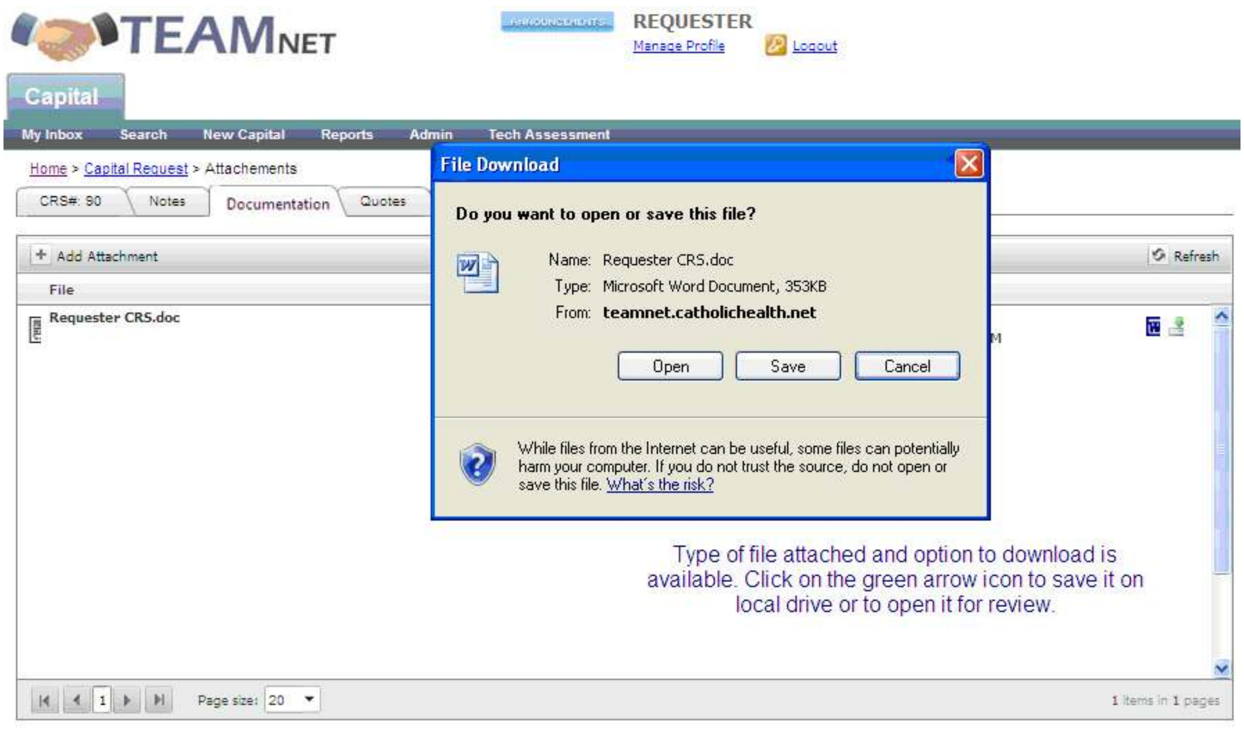


Figure 19 – Adding a Document

Adding a Document:

To add a document, click on the select button to open a window browser (Figure 16) and select the desired file. Click on the file name to select the file and then select Open to complete the selection. (Figure 17) Click on open to continue to the add attachment window and select upload (Figure 18).

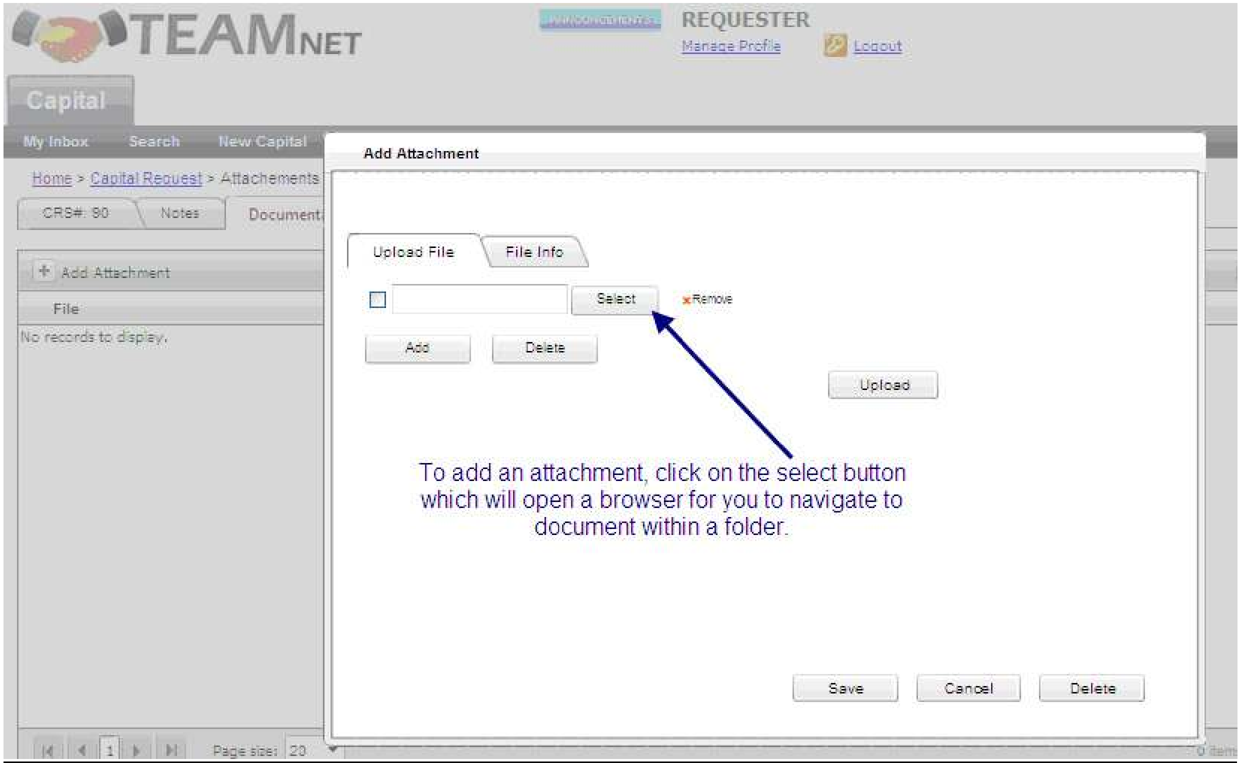


Figure 20 – Select Attachment

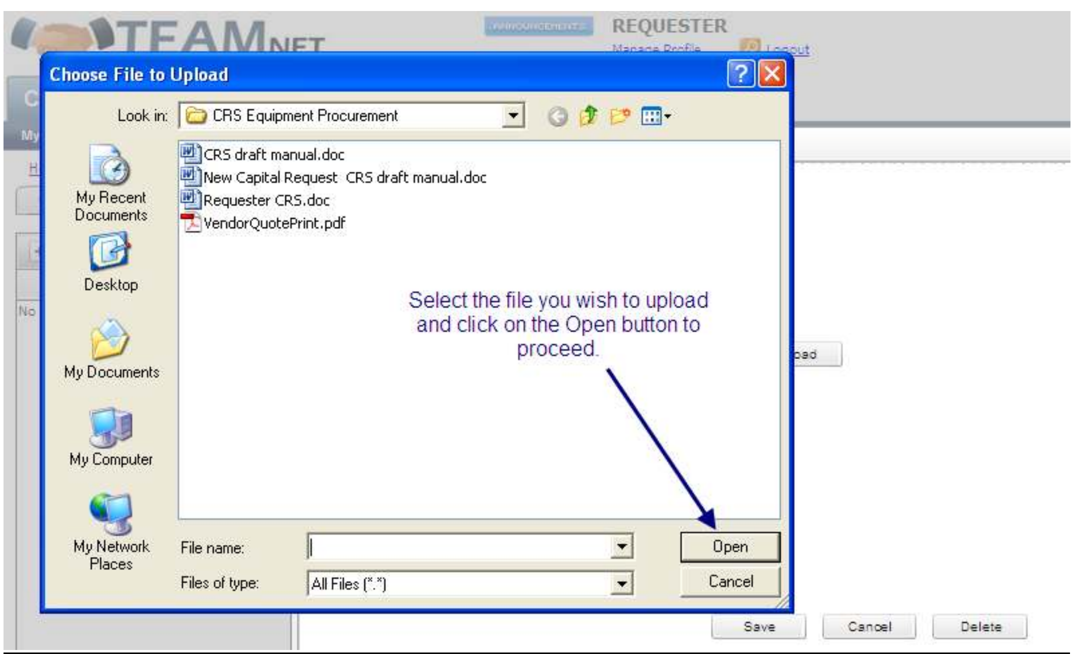


Figure 21 – Select Attachment

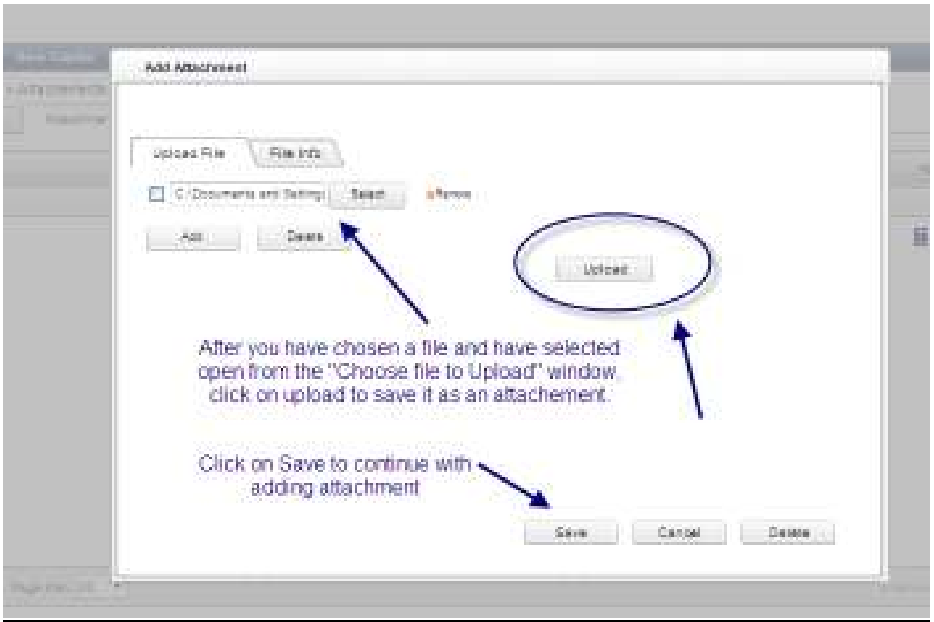


Figure 22 - Select Attachment

Click on "Save" to complete the add attachment process.

Multiple files may be uploaded simultaneously. Select individual files as described above and then the Add button to create an additional selection entry. The attachments will be zipped prior to upload and stored in a zip file format.

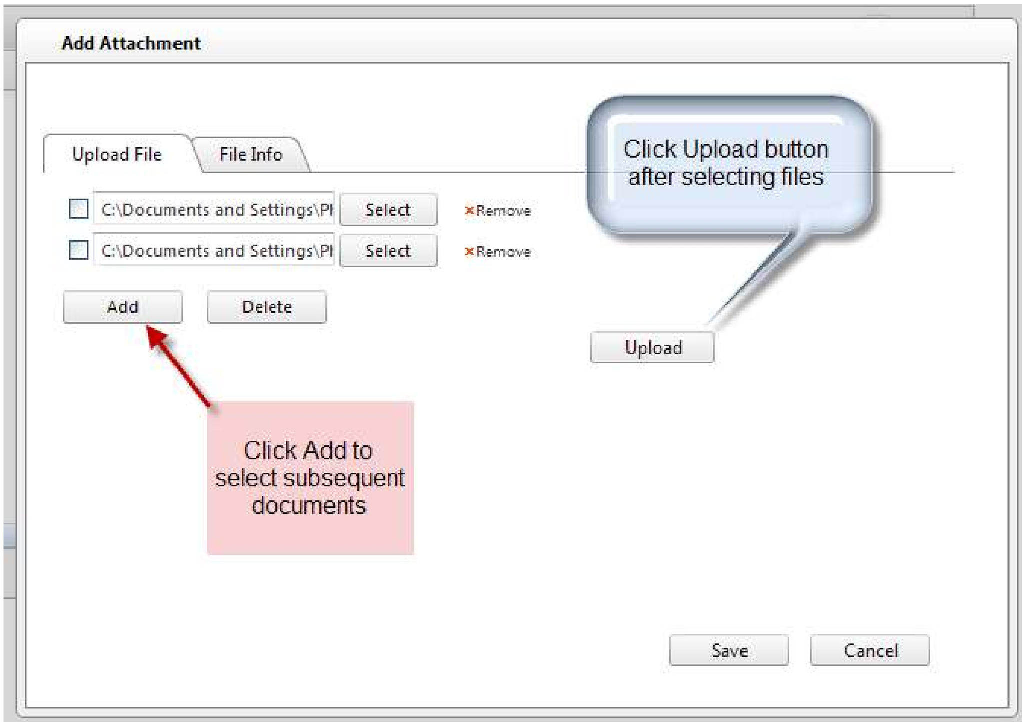


Figure 23 – Upload Attachment

The attachment file names default to the file name selected. In the case of multiple file selections the first file selected for upload is used as the file name plus the number of files included.

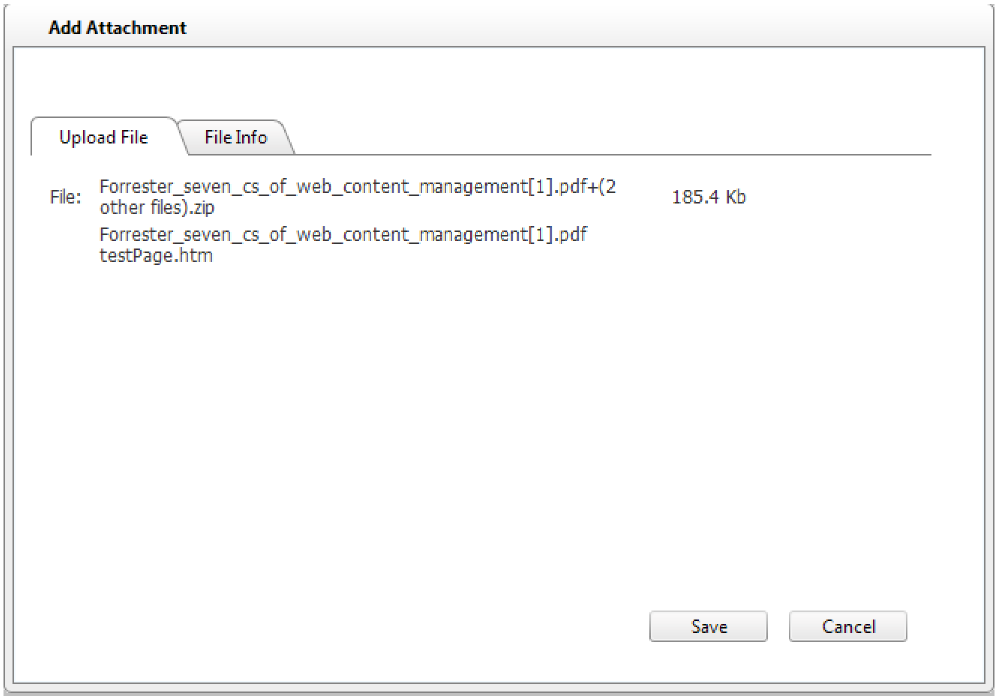


Figure 24 – Attachment Name

The File Info tab enables the user to provide additional information regarding the attachment. Providing the document type and a descriptive file name is particularly helpful to the collaboration team for scanned documents with numeric or coded file names.

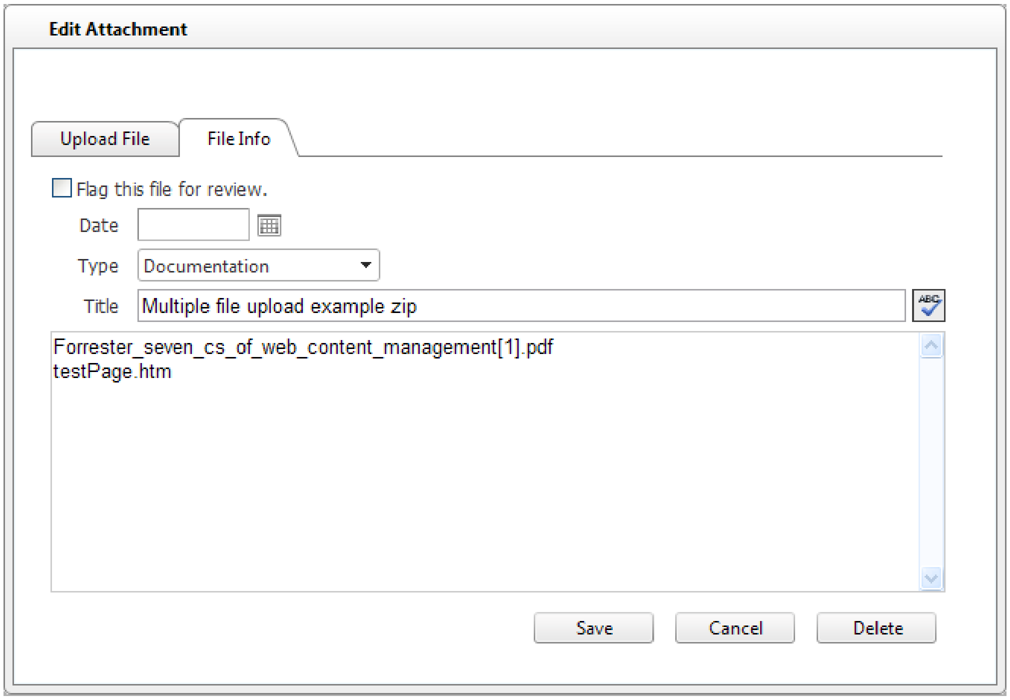


Figure 25 - File Info Tab

<u>Quotes Tab</u>

Requests will have a line for each vendor selected for the request. Quotes can be updated by selecting the quote individually.

Figure 26 – Quotes Tab

Click the  icon to open the Quote Number tab.

The user is presented with two current tabs and five new tabs. The new tabs are specific to the vendor selected. The tabs presented are:

CRS#: ### Tab – Returns user to capital request detail.

Quotes Tab – Returns user to the previous Quotes tab.

Quote: ### Tab - Vendor quote information and line items list.

Quote Notes Tab - Note capability as previous described. See H-Link for detailed instructions

Quote Attachments Tab - Attachment capability as previous described. See H-Link for detailed instructions

Quote History Tab - Displays data changes made to quote details

Quote Print Tab - Printout of quote data for selected vendor

Quote: ### Tab

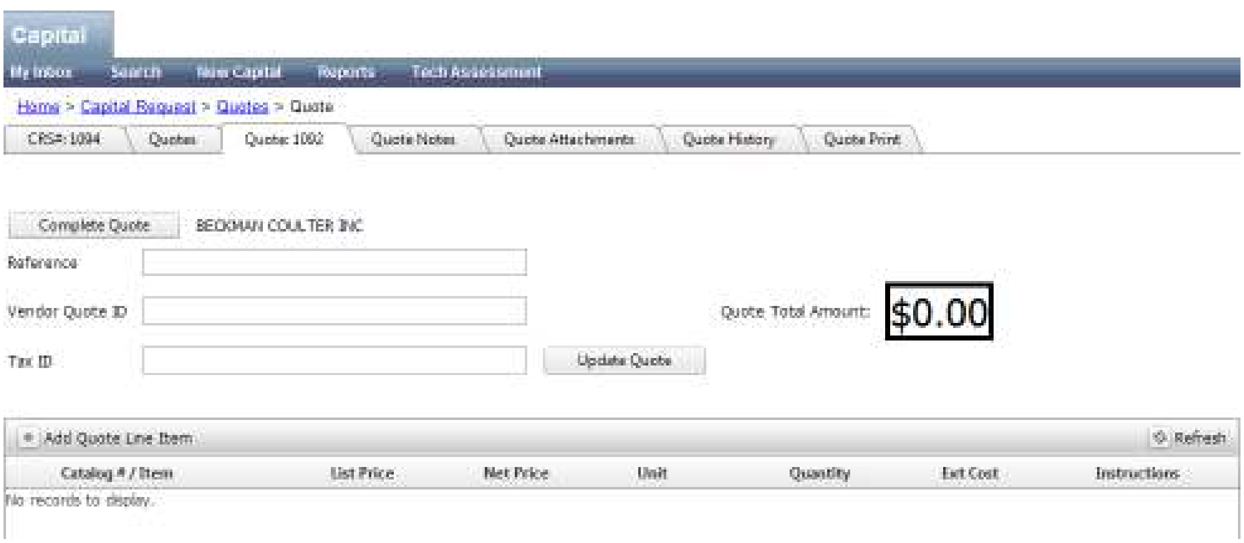


Figure 27 – Quote: ### Tab

Update Quote:

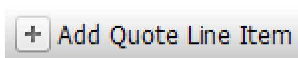
There are three required fields needed before the user can update the quote:

- **Reference** – The vendor's quote reference, enter 'None' if none provided.
- **Vendor Quote ID** – The vendor's quote number or ID, enter 'None' if none provided.
- **Tax ID** –Enter the vendor's EIN or federal tax ID, else enter "Unknown."

Click 'Update Quote' to save data.

Enter Line Item Details:

Add line item details as indicated on quote.

Click on 

to open line item detail screen

Enter the Catalog Number.

Clicking on  icon presents a list of previously entered vendor catalog numbers along with description and most recent quoted cost. Select the desired catalog number or if not listed, click 'Esc' key on computer keyboard and enter a new vendor catalog number.

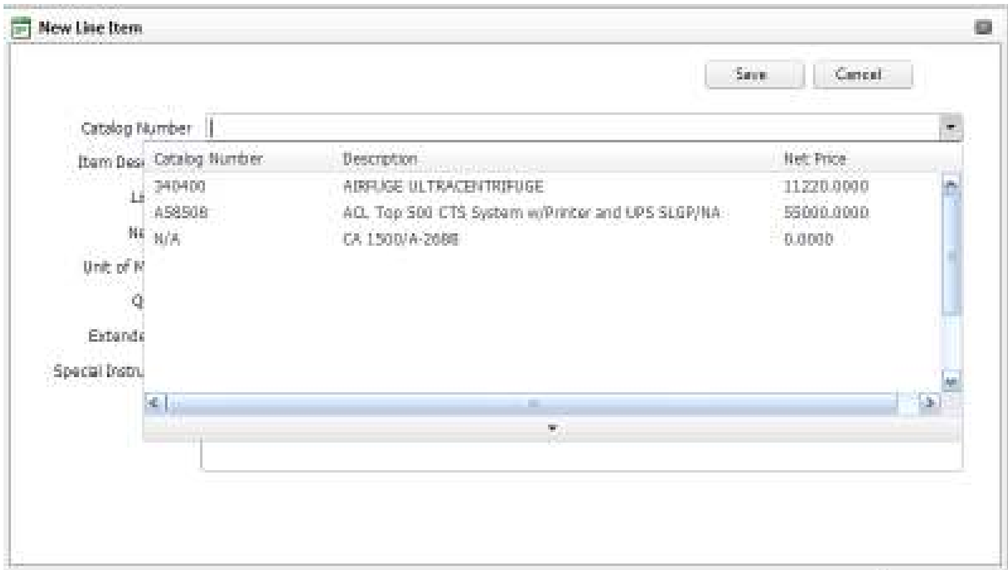


Figure 28 – Add New Line Item

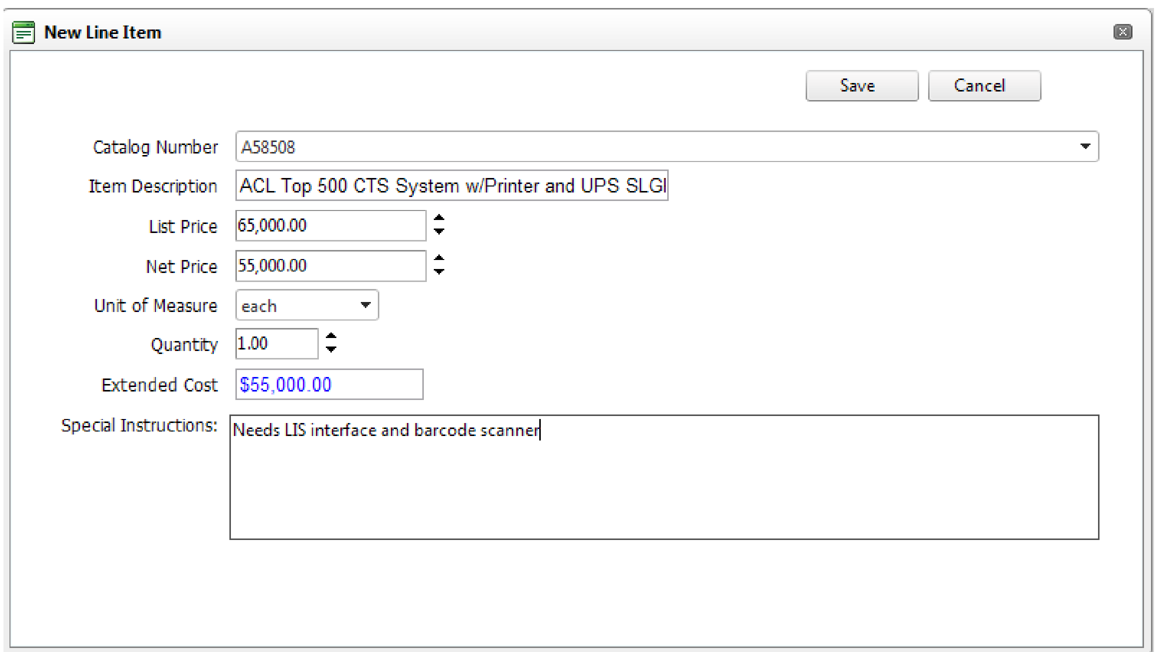


Figure 29 – Add New Line item

Enter remaining fields.

All fields are required to ‘Save’ except Special Instructions.

Click on ‘Save’ button to store data and return to vendor quote information tab.

Click on ‘Cancel’ button to discard item and return to vendor quote information tab.

Saved items can be deleted after by clicking on the item icon and selecting ‘Delete’ button.

Quotes can be changed until the ‘Complete Quote’ button is activated.

Return to the Quote tab.

If quote revisions are required select ‘Request Updated Quote.’ The Vendor notification screen appears.

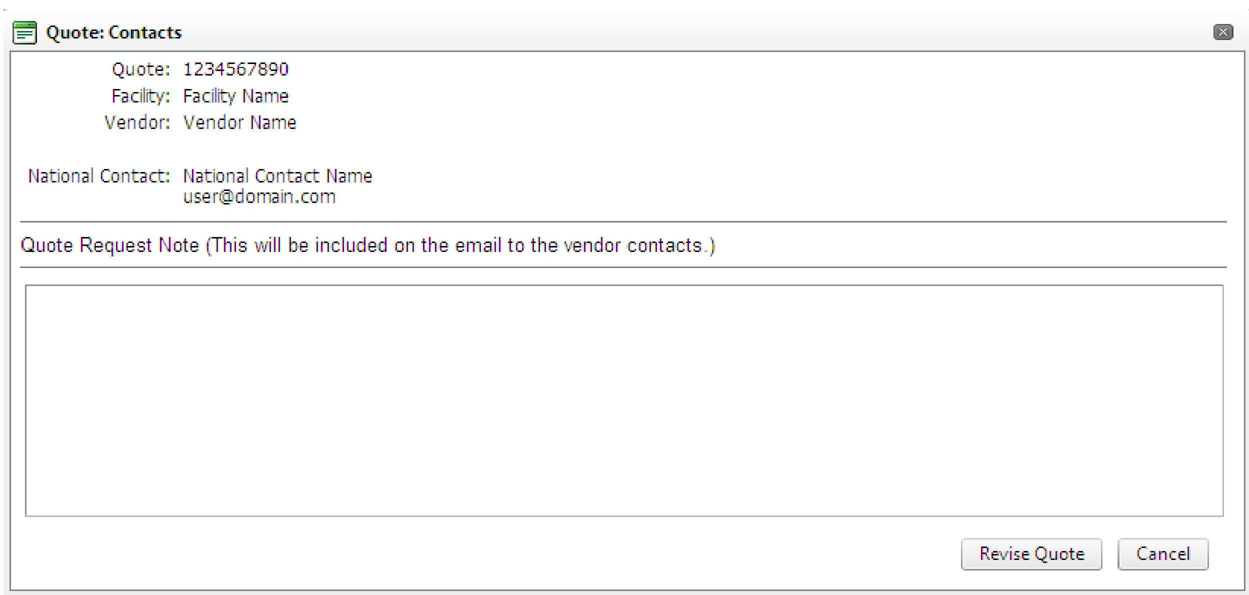


Figure 30 – Quote Contacts

Complete Quote Request Note then click on Revise Quote or Cancel.

This creates a duplicate record that allows line item edits.

Figure 31- Quote Tab Line Items

The original quote details in the listing are changed to a strikethrough font to indicate the status is inactivated. The details can still be viewed for reference by clicking on the icon.

Note: the Awarded checkbox can no longer be selected for this record.

The original quote is duplicated with all line items and assigned a new Quote ID.

Click on the icon by the new Quote ID.

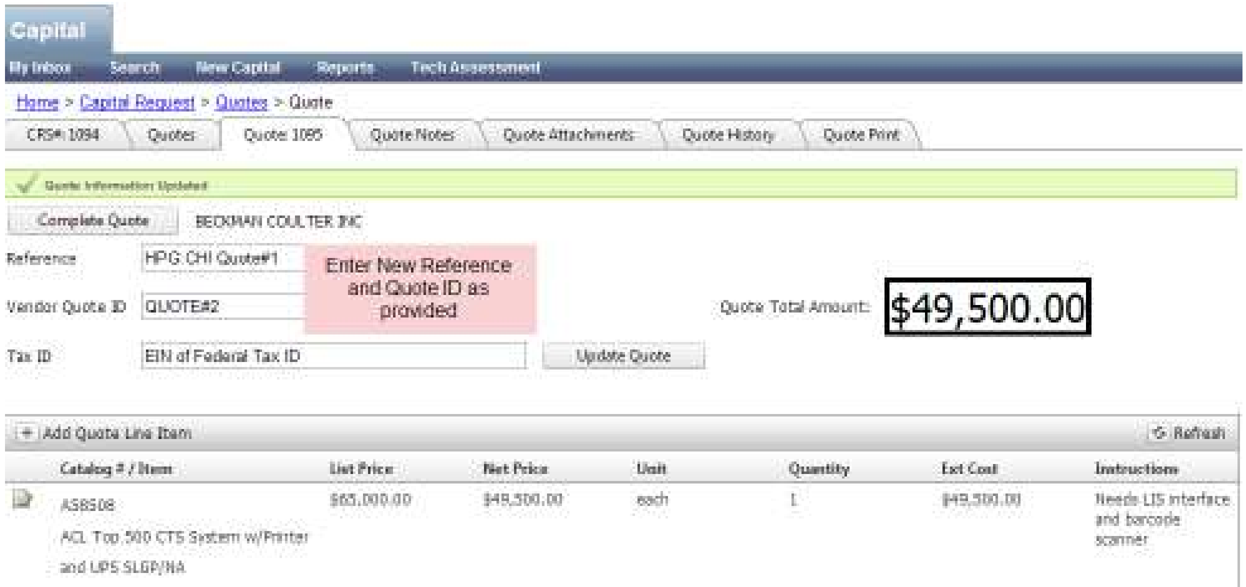


Figure 32 – Updating Quote

Enter an updated Reference and Vendor Quote ID. Click on the icon to edit line item.

Quote Revisions may be requested as often as required.
Once line items are completed, select 'Complete Quote' to lock the quotation record.

Quote Notes Tab

Previously described here.

Quote Attachments Tab

Previously described here.

Quote History Tab

The history tab displays the creation and edits made to the quote information. The displayed history is not always immediate. The history logging occurs as application processor resources are available.

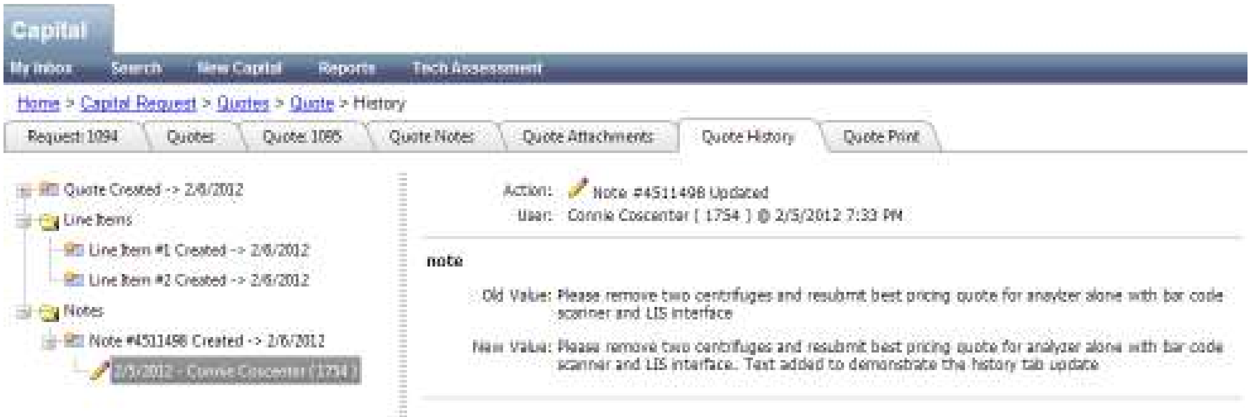


Figure 33 – Quote History Tab

Quote Print Tab

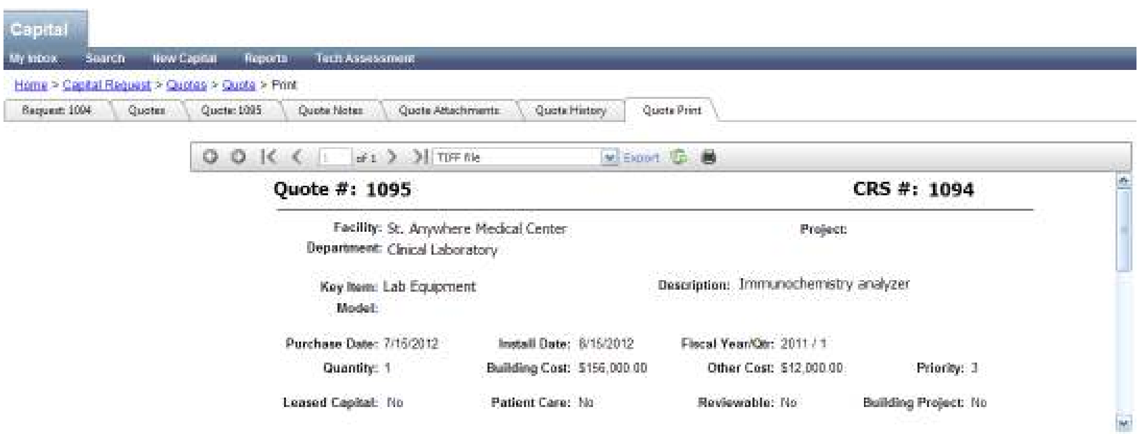


Figure 34 – Quote Print Tab

The quote print tab generates a report that can be sent to a printer or exported for electronic transfer.

The slider on the side of the report viewer can be moved to reveal hidden portions of the report.

(See appendix B for an example of the entire printed report)

Award Quote:

Click the Quote tab.

Once the final negotiation and selection has been determined indicate the winning quote by checking the appropriate "Awarded" box. Only one quote can be 'Awarded.' If the incorrect quote is selected, simply select the correct quote to change the award. This may be changed until the request is submitted.

History Tab

Selecting the process history tab (under History) will display the process of who has reviewed the item or taken action.

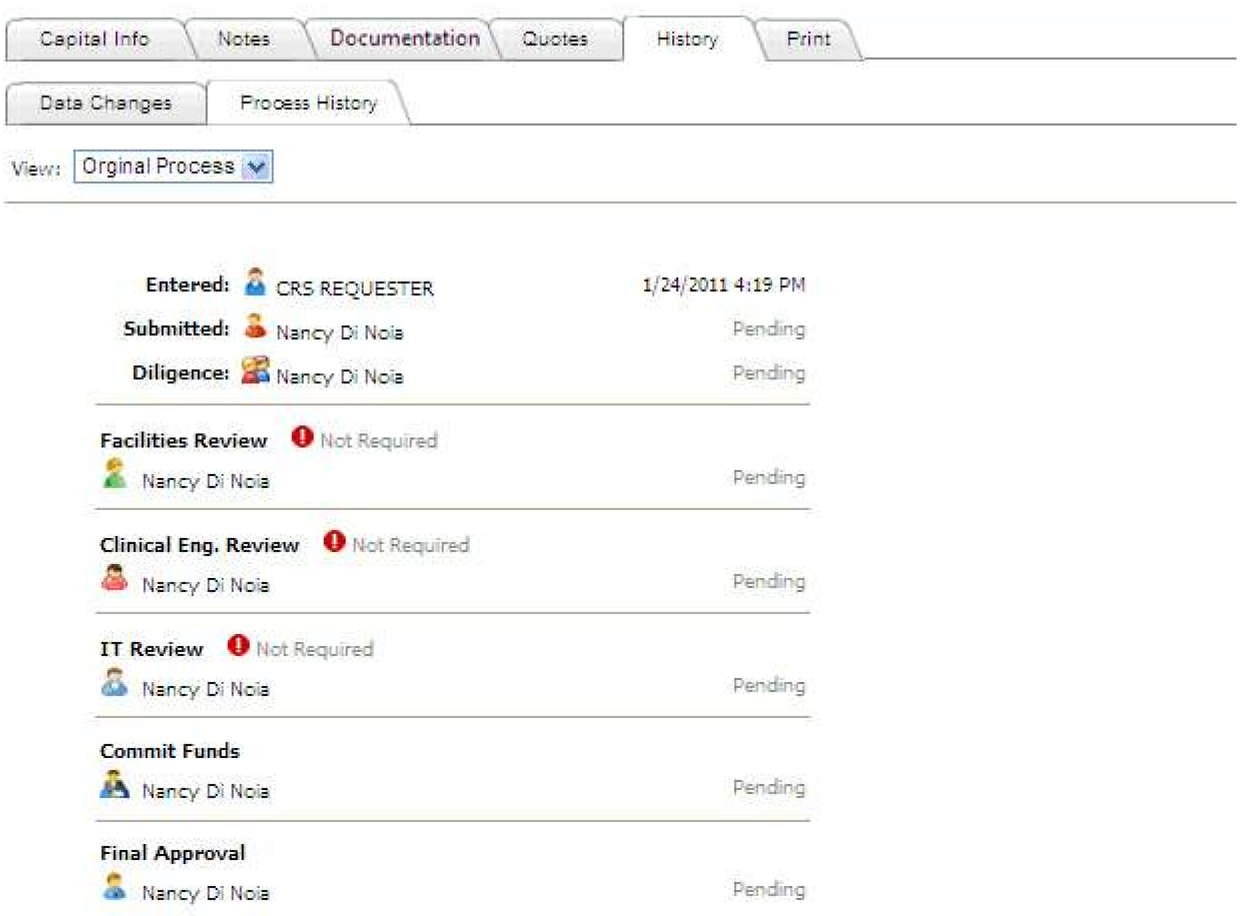


Figure 35 – History Tab

After a request is 'Submitted' the spiral notepad section shows the review work-list and the timestamp of signoff or process activities. All steps still requiring action show 'Pending' in place of a date/time stamp. If the functional area is Not Required , a review date/time stamp is not needed for the commit funds process step.

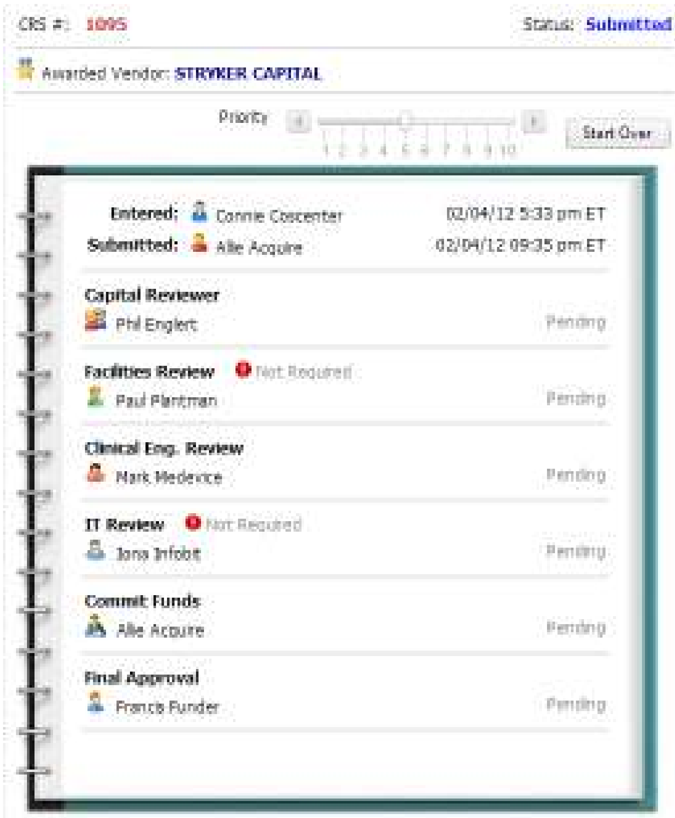


Figure 36 – Review Work List

Note: The Not Required option is set for each facility and cannot be customized for individual requests.

Print Tab

Selecting the print tab option will enable the user to print the CRS project report. The option to either print to paper or to export is available on this screen. Click on the print icon to print.

Select the export format you desire and click on the export button next to the refresh (green arrows) icon.

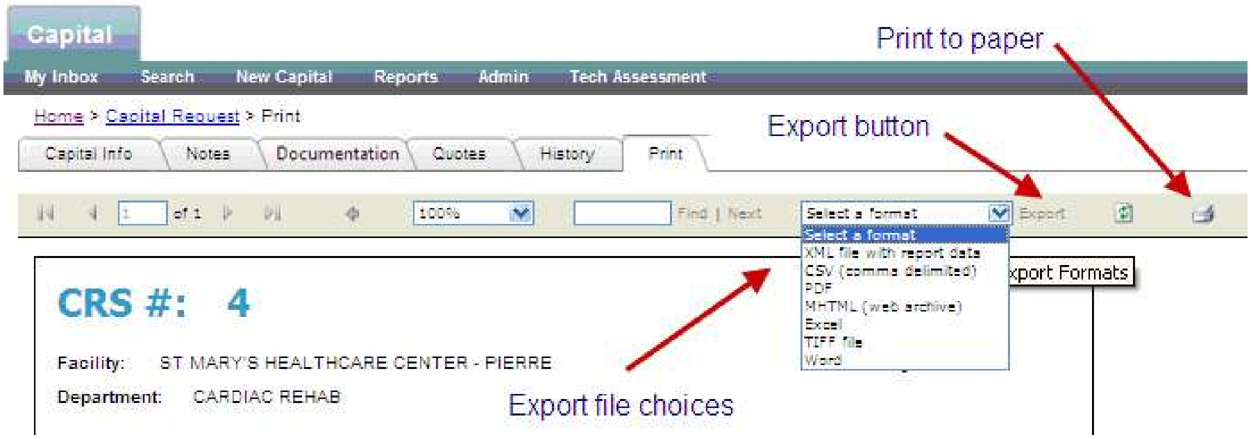


Figure 37 – Print Tab

Users have the option to open or save an exported file. If an export format is not selected, the export function is inactive.

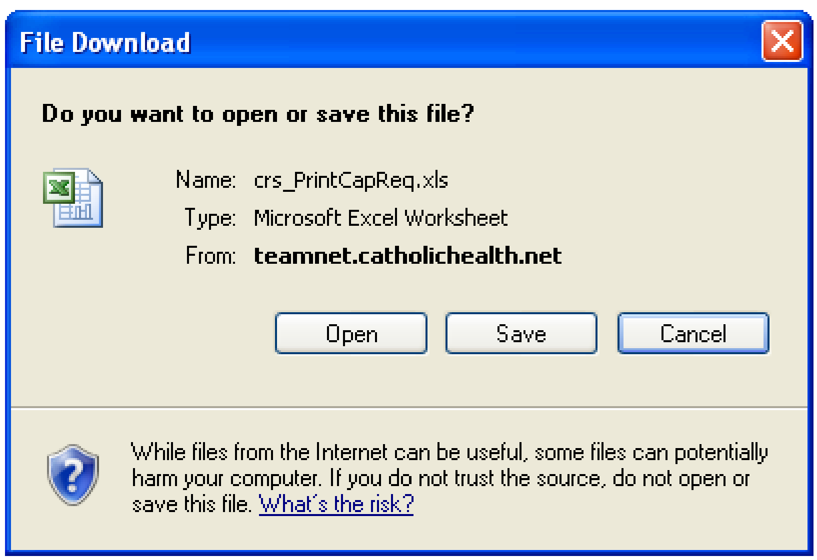


Figure 38 - Print Export

If save is select, it will ask for a destination. Select the appropriate folder from the system and rename if appropriate and select save. Users can still cancel the save at this time by selecting cancel.

Save Request:

Click the 'CRS#' tab and select 'Save' to update the request information.

This request will now appear on the dashboard of the assigned submitter for "action due by me now."
Once the assigned submitter selects the "Submit Request" button the workflow review list is generated and the record is locked.

Reports Menu Selection

Select the working report from the pull-down menu selection.

Figure 39 - Reports

Select the desired report.

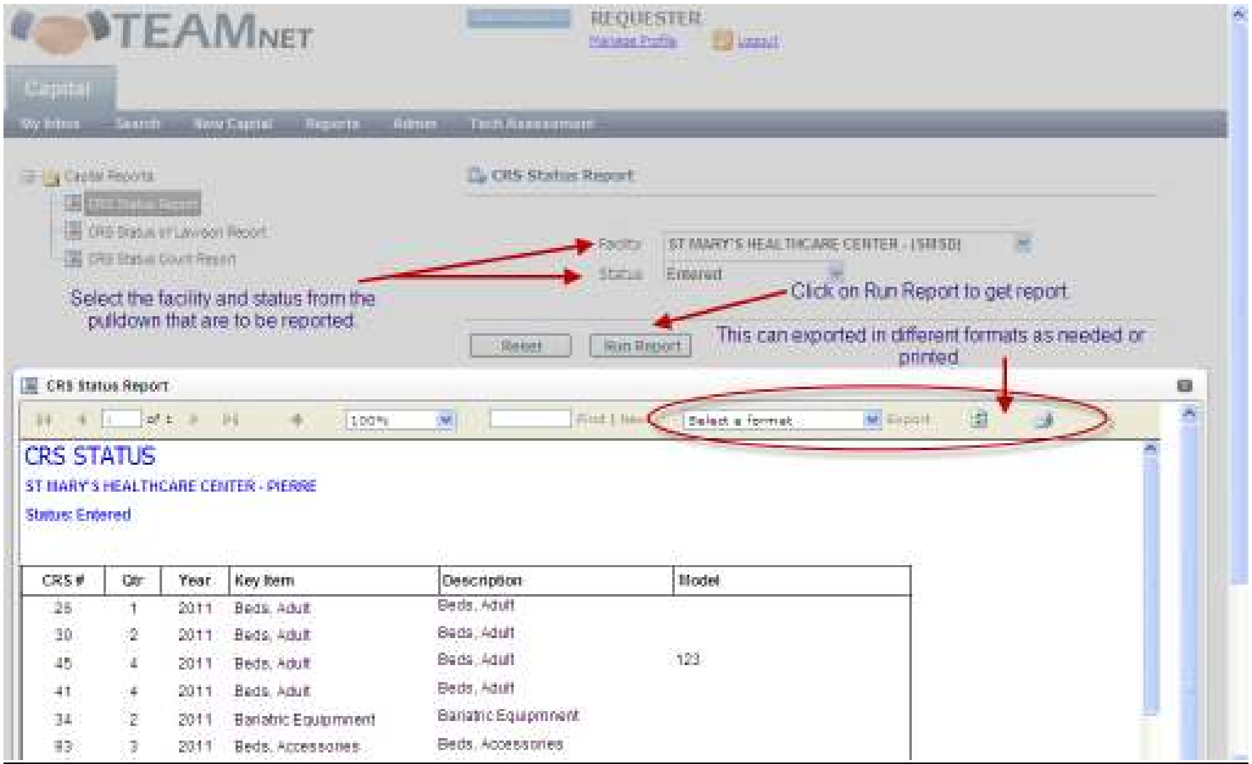


Figure 40 - Reports

Figure 41 - Reports

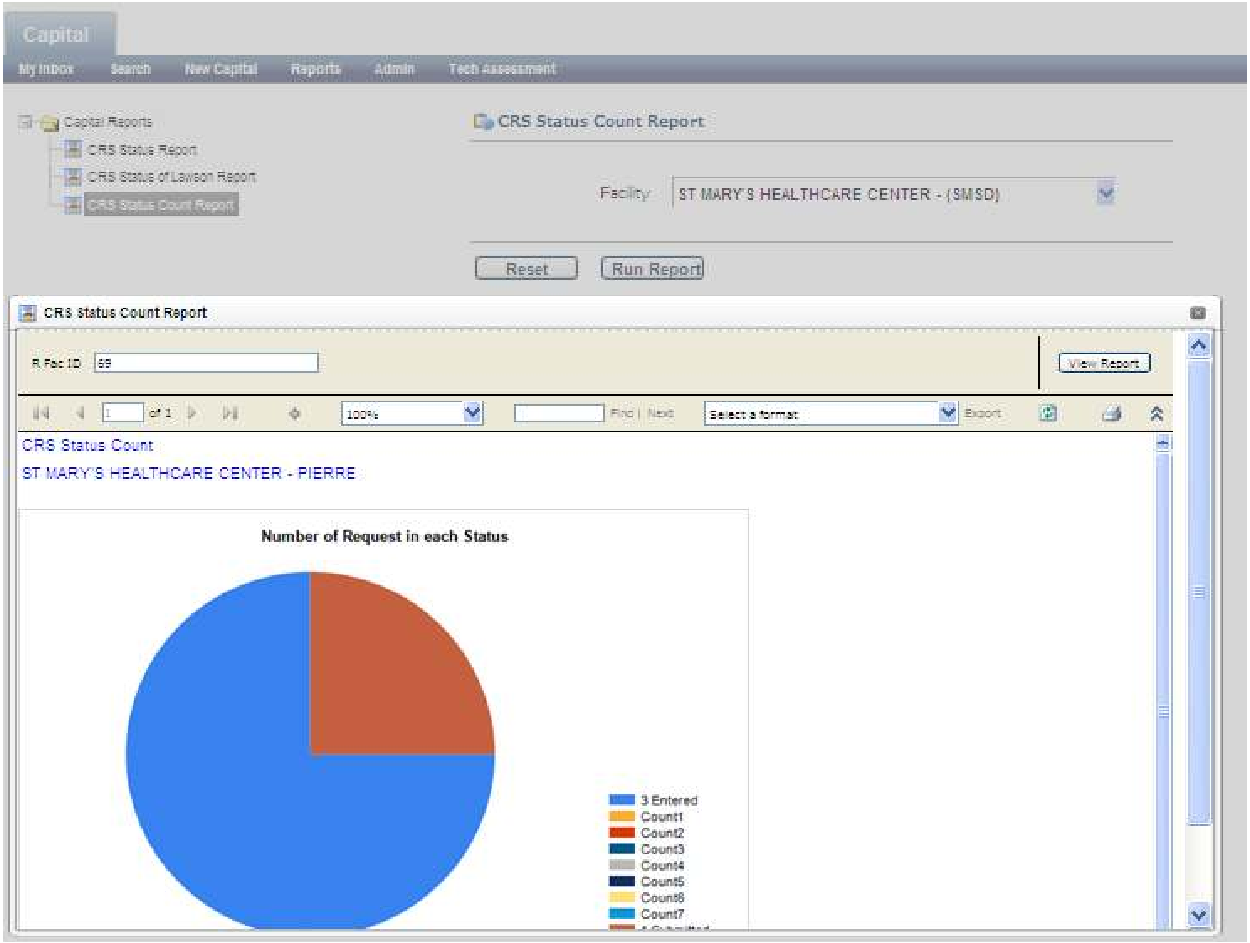


Figure 42 - Reports

Admin Menu Selection

Not present for all users – opens admin screen for managing system tables.

Tech Assessment Menu Selection

Provides list of Clinical Engineering (CE) equipment with category scoring from Technology Assessment.

Manage Profile

Name, password and email address may be managed through the Manage Profile selection at the top of the screen.

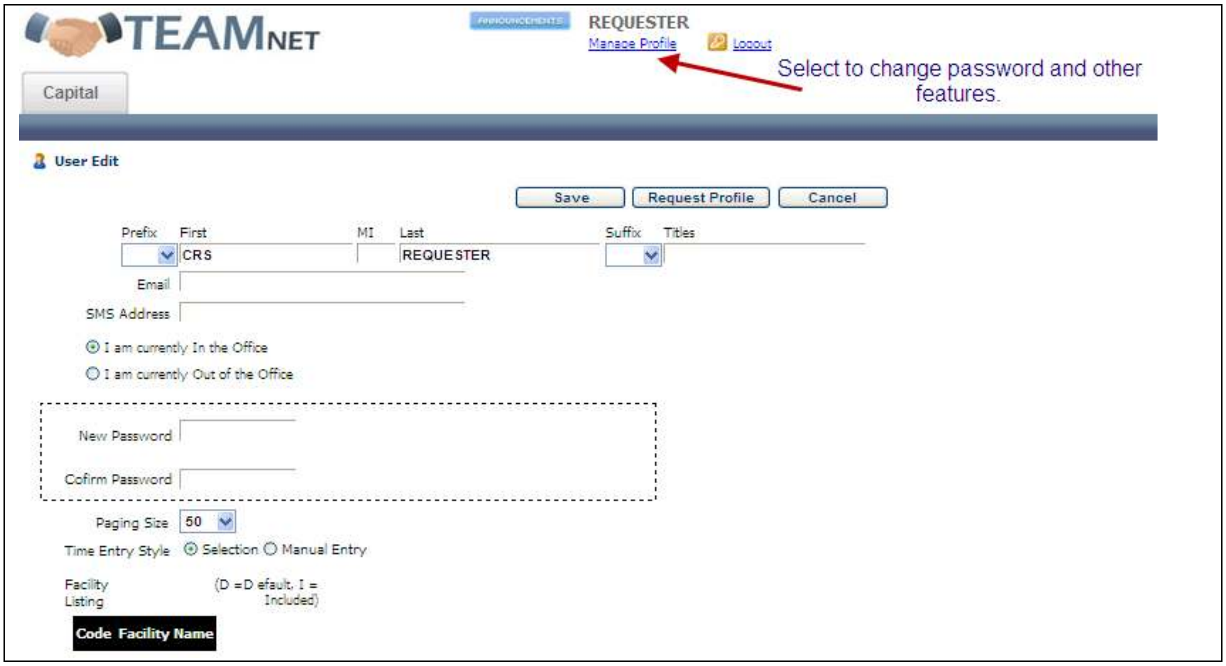


Figure 43 – Manage Profile

Appendix B - CRS Report

Quote #: 1095 — **CRS #: 1094**

Facility: St. Anywhere Medical Center — **Project:**
Department: Clinical Laboratory

Key Item: Lab Equipment — **Description:** Immunochemistry analyzer
Model:

Purchase Date:	7/15/2012	**Install Date:**	8/15/2012	**Fiscal Year/Qtr:**	2011 / 1		
Quantity:	1	**Building Cost:**	$156,000.00	**Other Cost:**	$12,000.00	**Priority:**	3
Leased Capital:	No	**Patient Care:**	No	**Reviewable:**	No	**Building Project:**	No

Task	User	Phone	Date Performed	Required
Submitter	Allie Acquire			True
Capital Dilligence	Phil Englert			True
Facilities Review	Paul Plantman			False
Clinical Eng. Review	Mark Medevice			True
IT Review	Iona Infobit			False
Commit Funds	Allie Acquire			True
Final Approval	Francis Funder			True

Vendor: BECKMAN COULTER INC
Contact: — **Email:** Rodney@Microcodeinc.com — **Phone:**

Catalog	Description	Qty.	Unit	Unit Price	Extended
A58508	ACL Top 500 CTS System w/Printer and UPS SLGP/NA	1	each	$49,500.00	$49,500.00

Needs LIS interface and barcode scanner

Total: $49,500.00

Note

Figure 44 – CRS Report

Appendix C - START OVER Process

If changes need to be made to the requisition information after the PO has been issued, starting over with a new request is not required. Complete the following steps for editing the requisition after the PO has been issued.

To revise requisition data after a PO has been issued, contact your Capital Buyer as soon as possible to cancel original PO. Go into request and click on recommit (bottom right) on the request.

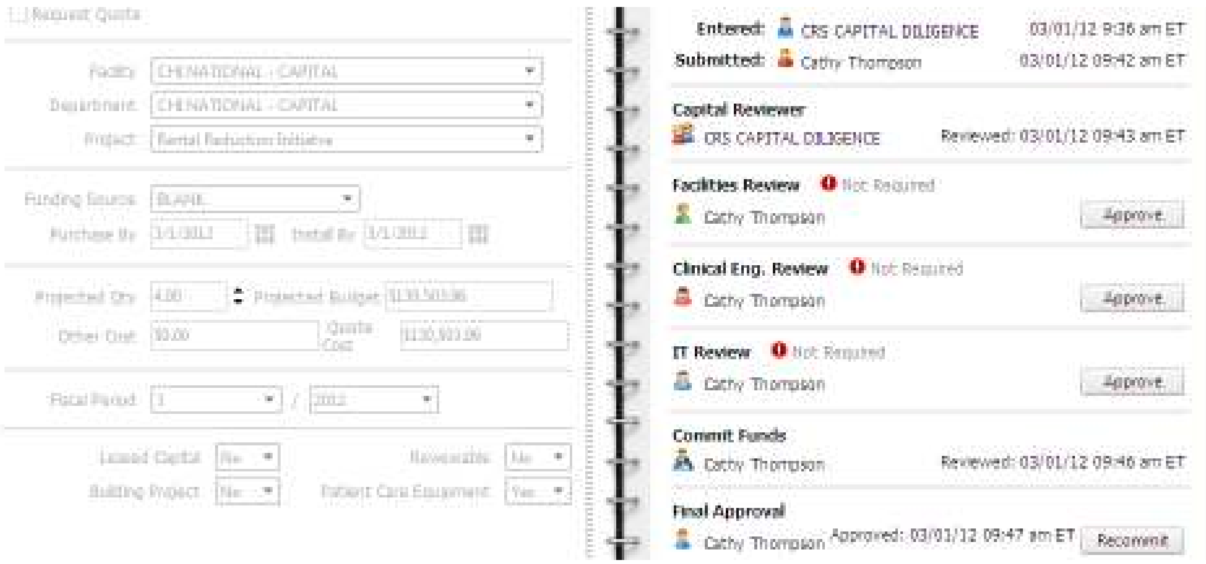


Figure 45 – Start Over Process

A pop-up box will appear to enter the reason for the recommit. Enter the reason for the change and the briefly describe the changes to be made. When satisfied, click the 'Start Over' button (top right) on the Capital Info tab. This keeps the information on the original request and allows editing of the information on the request prior to submitting the requisition again.

Figure 46 – Start Over Process

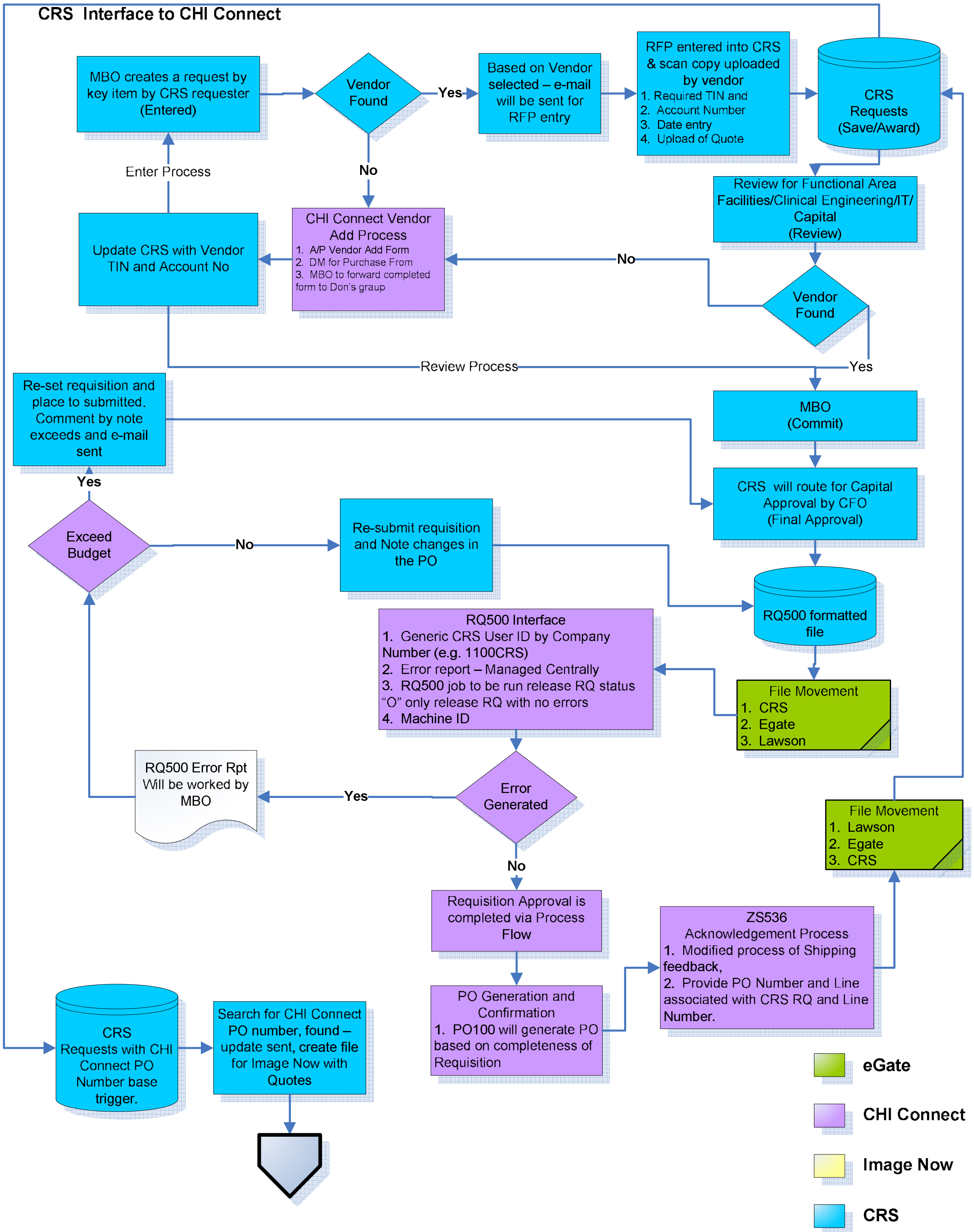
To add a new quote: go to the quote tab, select Request Updated Quote. This will strike through the existing quote and allow the ability to add a new quote to the request. Now add or edit line item information. Once the line item information is consistent with new quote, and the new quote is attached, re-submit the quote. This will take the request back through the capital diligence process and then to the commit funds and final approval process. Once the request is queued to Lawson and released in Lawson, a new PO # will be generated. The new PO# will populate on the request overriding the old PO #.

Figure 47 – Start Over Process

Appendix D – CRS Workflow

CATHOLIC HEALTH INITIATIVES®

CRS Interface to CHI Connect



CATHOLIC HEALTH INITIATIVES®

CRS Interface to CHI Connect

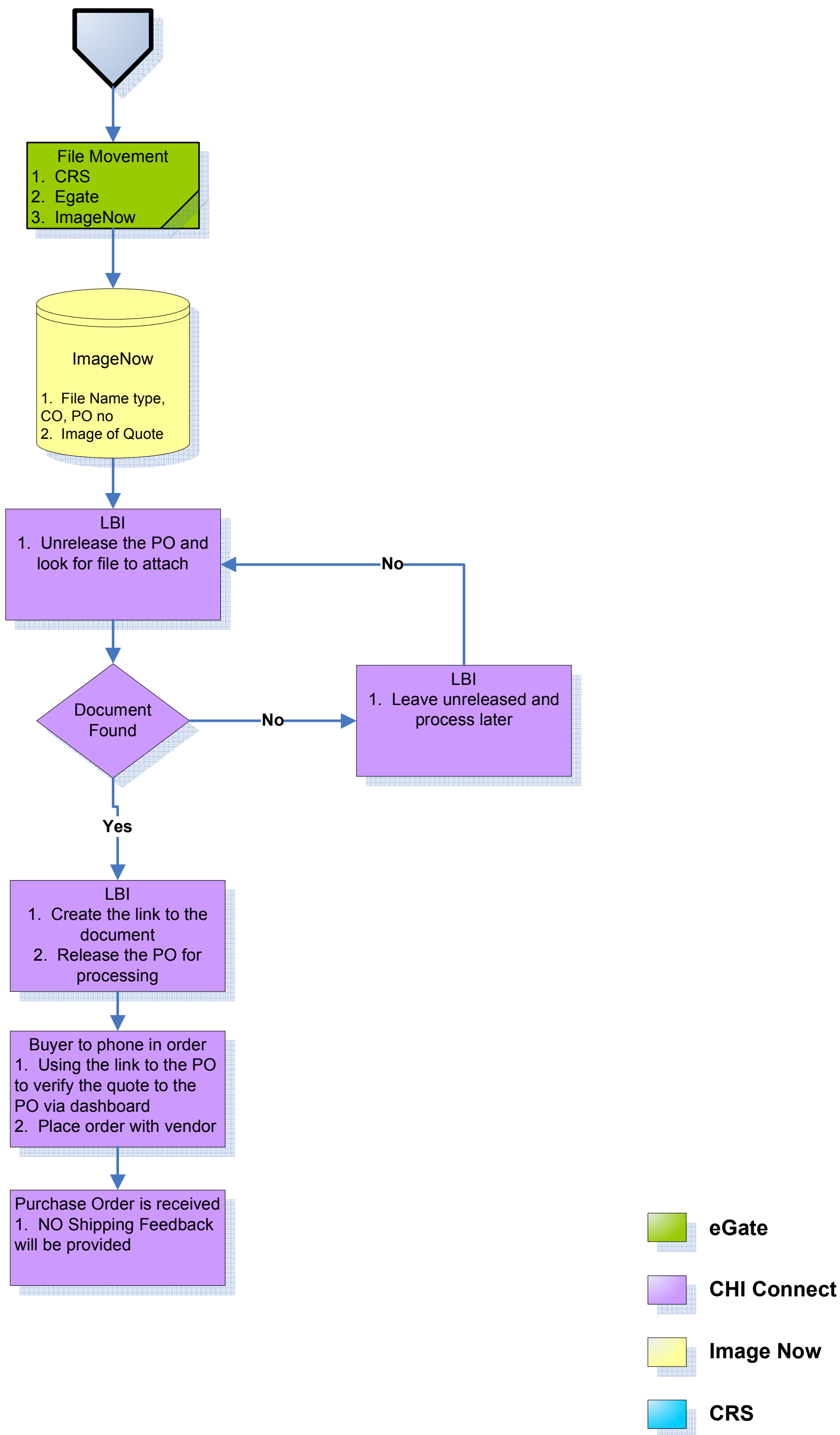


Figure 48 – CRS Workflow

Appendix E - Q&A's

Q) The vendor I selected says "***APSC vendor form needed." What do I need to do?
A) This indicates that the vendor purchase from location is not associated with this vendor for this facility. Please complete the appropriate fields of the APSC Vendor Maintenance Request Form and submit to APSC via email. Please ensure that you note "CRS" in the subject line of this email. If this is an urgent request, please indicate as such as to avoid potential delays in the process. You'll know that this process has successfully completed when the "***APSC vendor form needed" no longer appears after the vendors name in your request.

Q) I chose the wrong vendor in my request and the purchase order has been generated. How do I fix this?
A) Contact the senior buyer to cancel this purchase order. Then contact the TEAM Help Desk to change the status of this request to "Entered." This will allow the submitter to make the appropriate changes and reapprove the request to initiate the CHI Connect interface again for a new requisition and purchase order to be issued. – f/u with Rodney to determine if HD can set this status to "Entered" through the database to allow these updates

Q) The purchase order lines do not match the lines/components of the quote.
A) Contact the senior buyer to cancel this purchase order. Then contact the TEAM Help Desk to change the status of this request to "Entered." This will allow the submitter to make the appropriate changes and reapprove the request to initiate the CHI Connect interface again for a new requisition and purchase order to be issued. – f/u with Rodney to determine if HD can set this status to "Entered" through the database to allow these updates

Q) The invoice received does not match the purchase order. What do I need to do?
A) Please contact Accounts Payable procurement center to work with the expediter who can follow-up with the vendor to correct the discrepancy.

Q) I submitted my request yesterday through CRS and still do not have a purchase order. What do I need to do?
A) First, please check your RQ500 report to look for errors in your request or to confirm that your request transmitted successfully. If there are errors please address these errors and resubmit the request. If your request did successfully transmit, please wait for the PO100 job to run for this to be finalized. This job runs twice per day per facility.

Q) I am unable to add line items to the quote tab in my request. What do I do?

A) Are vendors listed in the quote tab? If not, please return to the CRS# tab and select the vendor(s) desired. If they are listed, click on the icon to the left of the vendor and select "Add Quote Line Item" at the bottom to proceed.