MFMP Change Review Board (CRB) Meeting

Meeting Information	
Meeting Title:	MFMP Change Review Board
Occurrence:	May 26, 2016
Time:	10:00am
Location:	DMS, Room 101, 4050 Esplanade Way, Tallahassee, FL, 32399

Attendees		
#	**Entity**	**Name**
1.	APD	Ashley Bridges
2.	DCF	Paul Mauck
3.	DFS	Gloriann McInnis
4.	DJJ	Carol Walters
5.	DMS	Doug McNease
6.	DMS MFMP	Bruce Roberts
7.	DMS MFMP	Jillian Green
8.	DMS MFMP	Judson Freeman
9.	DOH	Doug Black
10.	FDC	Anne Rabon
11.	FDC	Kris Burnside
12.	FWC	Jill Reynolds
13.	HSMV	Cricket Lee
14.	MFMP	Brian Janek
15.	MFMP	Chenee' Freeman
16.	MFMP	Felicia Thompson
17.	MFMP	Jeremy Kong
18.	MFMP	Robert Cooper III

Topic #	Agenda Topic Description
1.	CRB Organization
2.	Completed CRs
3.	CRs in Progress - CR 181 Update Encumbrance eForm
4.	Current CRs for Consideration
5.	Voting and Results
6.	Wrap Up

Meeting Minutes for Topics	
Topic #	**Minutes for Topics**
1.	**CRB Organization** Each agency provided MFMP with a primary and backup member. If the primary representative is unable to attend a CRB meeting, they should send their designated backup. These primary and backup representatives are at the Purchasing or Finance and Accounting Director level to ensure an enterprise perspective when reviewing enhancement requests. If a CRB member agency does not submit votes or send a representative for 2 quarterly meetings in a row, the agency will be removed and replaced with an agency that has expressed interest in joining the group. CRB members or delegates will be asked to participate in design teams for changes.
2.	**Completed CRs** The following CR(s) have been implemented since the last CRB meeting: <table><tr><th>CR #</th><th>Description</th><th>Hours</th><th>Implementation Date</th></tr><tr><td>CR 271</td><td>Add a special approver to a requisition approval flow by commodity code and total requisition amount</td><td>220</td><td>March 30, 2016</td></tr><tr><td>CR 298</td><td>Request to increase the character limitation on the email field on Address Change eForms</td><td>No cost (under 40 hours)</td><td>March 30, 2016</td></tr></table> **CR 271 – Add a special approver to a requisition approval flow by commodity code and total requisition amount** The business driver for this enhancement was the Legal Approver role. If the individual line items did not exceed the $65,000 threshold then the legal approver would not be added to the approval flow. Now, the legal approver will be added to the approval flow if the total requisition amount exceeds that threshold.

CRs in Progress
The following CR has been prioritized and approved for implementation:

CR #	Description	Hours	Implementation Date
CR 181	Create an eForm to update MFMP encumbrances in FLAIR	600	May 26, 2016

A new eForm titled, Update Encumbrance eForm, has been created to allow agency customers to update MFMP encumbrances in FLAIR.

The eForm is intended to be used by F&A customers in scenarios that require updates to the MFMP encumbrance due to various reasons.
- Examples: cancelled warrants, encumbered disbursement failures, changes made to MFMP encumbrances directly in FLAIR, incorrect line paid on an invoice, etc.

The eForm will only be accessible to users within a newly created group titled, Update Encumbrance eForm.

Q: Should requesters get the Update Encumbrance eForm role?
A: No, a user in Finance & Accounting would be preferable.

The new eForm will allow agency customers to search for a requisition and specify the MFMP encumbrance line(s) and amount(s) they wish to update.

Q: When this eForm is used to update the MFMP Encumbrance Amount, will it also update FLAIR?
A: Yes, the purpose of this enhancement is to ensure the MFMP Encumbrance Value and the Current FLAIR Amount are in sync.

Q: Will there be any additional training associated with this enhancement?
A: MFMP will be updating the Buyer manual, which will include information about this enhancement.

CRs for Consideration
Based on previous customer feedback, the MFMP team completed a rough order of magnitude (ROM) for service hours on the following CRs.

CR #	Description	Hours
CR 295	Add password validation functionality to the FLAIR Login eForm	500
CR 300	Set PO Balance to $0 for purchase orders associated to p-cards	80
CR 291	Only add the OBO to the approval flow on change orders when the OBO is the only change on the PR	120
CR 293	No approval flow for change PRs that don't alter the overall dollar amount by a certain threshold	100

CR 295 – Add password validation functionality to the FLAIR Login eForm
This enhancement would add validation to the FLAIR Login Information eForm to check if the password is updated appropriately. MFMP would pass the username and password to FLAIR to validate and show the eForm as successful if all passed or failed if the passwords did not match. The goal of this enhancement is to reduce the number of failed transactions caused by incorrect passwords and to prevent a delay in reapproving requisitions or invoice reconciliations through the full workflow.

Please note that users with multiple site codes will need to submit a separate eForm for each site code.

Q: Will this functionality prevent the user from inputting the incorrect site code?
A: No, the user must select the correct site code.

CR 300 – Set PO Balance to $0 for purchase orders associated to p-cards.
The Buyer application does not allow purchase orders associated with a p-card to be invoiced. As a result, the PO balance field associated with the p-card PO is never reduced. This enhancement would allow the PO balance on p-card purchase orders to be set to $0.

Many agencies leverage the PO balance field to determine if a PO is outstanding. This enhancement would help clean up the reports and provide clarity by updating all POs associated with p-cards within the last two years.

Q: Would this enhancement prevent a user from submitting a change order?
A: No, the user will still be able to submit change orders. When a new PO is generated based on that change order, it will have a balance of $0.

4.

CR 291 – Only add the OBO to the approval flow on change orders when the OBO is the only change on the PR.
This enhancement would add an approval flow rule for change orders that will only add the OBO if the OBO is the only change made to the requisition. This would prevent the change order from going through the entire approval flow again.

Q: Who is requesting the OBO?
A: The current requester or another user in the current approval flow.

This enhancement would be configurable, giving each agency the ability to set whether or not the OBO user is required to approve the requisition. This enhancement would leverage the CO No Workflow Group to ensure that only select users may skip the full approval flow.

The business driver for this enhancement is DEP and the petroleum program. DEP uses OBOs to designate their Contract Managers and they often submit change orders that only change the OBO.

CR 293 – No approval flow for change PRs that don't alter the overall dollar amount by a certain threshold.
If a user submits a change order on a requisition that adds funds, the change order will be sent through the approval flow. This enhancement would prevent change PRs under a certain threshold from going through full approval flow process.

Q: What is the threshold?
A: MFMP is proposing that this enhancement be configurable by PUI. This allows each agency to set their own threshold based on a percentage of the total requisition amount.

This enhancement was submitted by DEP. DEP's petroleum program often makes marginal changes that results in a relatively small impact on the overall dollar amount.

Q: Is there a limit on the number of available hours? In years past, there have only been so many hours available and that has impacted the enhancements that are prioritized.
A: No. MFMP will present the top two enhancements to executive leadership for approval as usual. Enhancements can always be brought back for consideration in future Change Review Board meetings.

Q: Why can't all four enhancements be prioritized if the total hours are under the limit?
A: It is a DMS agency decision to prioritize the top two enhancements.

Voting

Ranking	CR #	Description	# of Votes
1	CR 291	Only add the OBO to the approval flow on change orders when the OBO is the only change on the PR	28
2	CR 295	Add password validation functionality to the FLAIR Login eForm	26
3	CR 293	No approval flow for change PRs that don't alter the overall dollar amount by a certain threshold	22
4	CR 300	Set PO Balance to $0 for purchase orders associated to p-cards	22

CR 293 was prioritized over CR 300 because no agency listed CR3 00 as their top priority. One agency voted for CR293 as their top priority so precedence was given to that enhancement.

CR 291 and CR 295 will be presented to executive leadership for their approval.

Q: Did *CR 2 – Vendor 'Remit To' address, 'Does Business As' name and 1099 name on invoice and printed PO* get approved?
A: No, CR 2 was denied by DMS leadership

FDC requests that CR 2 be considered for prioritization again in the next CRB meeting.

Please keep in mind that each agency suggests enhancements with their own agency in mind. MFMP will always consider each enhancement at an enterprise level to ensure that each enhancement will provide benefits for all agencies.

Q: Is there a change request for mass edit of commodity codes?
A: There is a change request for mass editing contract number and commodity code from AHCA. MFMP can look at adding more fields to that proposed enhancement.

Q: Does that change request apply when creating multiple line requisitions with the same commodity code?
A: MFMP will check and if not, MFMP will log a CR on behalf of DCF.

Most accounting details should be able to be mass edited with the exception of a select few free text fields. There are instances where information, such as the STC number, is copied onto the requisition with additional information attached. Currently, each field would need to be edited one at a time. A CRB member proposed that those fields be blanked out to force the user to input the correct number.

Q: What direction is the state going with punchout catalogs?
A: MFMP is continuing to pilot the punchout audit functionality with the medical dental contracts. MFMP is on track to have the pilot begin by June 30th, 2016.

Q: Is there a chance of allowing punchout catalogs outside of STCs?
A: No, not at this time.

| | Judson Freeman recently spoke with a state representative from Mississippi. Mississippi has eliminated all punchout solutions as a control mechanism and to simplify their processes. There were punchout solutions that were not tied to a STC or ACS and agency customers were not buying into the punchout solution concept. There was also no requirement to use the ERP solution. In Florida, agency customers frequently identify punchout catalogs as one of the most valuable resources.

Q: Which industry or category is MFMP going to target after medical dental?
A: MFMP has received a great deal of interest in the punchout audit functionality being applied to office consumables. Office consumables is the largest category based on order volume. MFMP is waiting to review the results of the pilot and may decide to hold off on tackling office consumables until the punchout audit functionality is more mature.

Q: Is the issue with the office consumable vendors?
A: No, there's no issue with office consumable vendors.

Commodity based contracts are the best candidates for the punchout audit. Service based contracts are more difficult because pricing and hours of work can vary. |
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| 6. | The next CRB meeting will be scheduled for **August 16, 2016**.

As a reminder, MFMP posts a monthly Change Request list on the MFMP website under Meeting Materials.

Please visit the following link to view the most recent Change Request list:
MyFloridaMarketPlace Change Request List

If you have further questions please contact the MFMP team at MyFloridaMarketPlace@dms.myflorida.com.

Please submit any enhancement requests by the end of July to give the MFMP time to assess the parameters of that enhancement. Please note that enhancement requests submitted by this date will not receive a rough order of magnitude. |

Action Items					
#	**Action Item Description**	**Assigned To**	**Status**	**Due Date**	**Comments**
1.	Determine if there is a change request logged that will allow agency customers to copy specific fields when using the "requisition copy" functionality. DCF raised a concern about unwanted fields being copied (such as STC #) on copied non-catalog requisitions.	MFMP	Complete		MFMP has confirmed that a change request has not been logged for this request. MFMP will discuss this CR at the next scheduled MFMP SRB meeting.