MFMP Customer Round Table Meeting

Meeting Information	
Meeting Title:	MFMP Customer Round Table Meeting
Occurrence:	November 13, 2017
Time:	1:30 p.m.
Location:	Betty Easley Conference Center, Room 166, 4075 Esplanade Way

Attendees		
#	**Entity**	**Name**
1.	AHCA	Emily Leffler
2.	APD	Sue Taylor
3.	DCF	Kathy Rothman
4.	DCF	Rob Dorman
5.	DEO	Kim Ryals
6.	DEO	Sara Martin
7.	DEP	Candace President (via phone)
8.	DEP	Loree Wynn (via phone)
9.	DEP	Lydia Griffin (via phone)
10.	DFS	Sharon Bussey (via phone)
11.	DJJ	Carol Walters
12.	DJJ	Holly Rabon (via phone)
13.	DLA	Marie Bailey (via phone)
14.	DLA	Tina Vaughan (via phone)
15.	DMS	Ann Reeves
16.	DMS	Shaun Whitfield
17.	DMS MFMP	Betsy Chance
18.	DMS MFMP	Bruce Roberts
19.	DMS MFMP	Jillian Green
20.	DMS MFMP	Tyler Brown
21.	DOR	Grace Sumpter (via phone)
22.	DOR	Terry Paul
23.	DOS	Kechia Herring
24.	DOT	Joseph Davis (via phone)
25.	DOT	Sherill Johnson
26.	EOG	Catherine Heth
27.	FDC	Anne Rabon (via phone)
28.	FDC	Jacklyn Colson
29.	FDC	Mable Jones
30.	FDC	Sharita Newman
31.	FDLE	Justin Payne
32.	FDVA	Robert Chauncey (via phone)
33.	FWC	Jackie McNealy
34.	FWC	Rachel Bozeman
35.	FWC	Sandy Watson (via phone)
36.	MFMP	Brian Cliburn
37.	MFMP	Crystal Owens
38.	MFMP	Delvis Catchman
39.	MFMP	Felicia Thompson

40.	MFMP	John Hunter
41.	MFMP	Matthew Bojalad
42.	MFMP	Michael Jackman (via phone)
43.	MFMP	NeShae Williams
44.	MFMP	Robert Cooper III
45.	SCA	Andrea Skaling

Topic #	Agenda Topic Description
1.	Annual Vendor Inactivation Process
2.	Transaction Fee Exemption Updates
3.	FLAIR Gap Effort
4.	IT Staff Augmentation eQuote Template
5.	Training Updates
6.	Annual Customer Survey
7.	Open Forum

Meeting Minutes for Topics	
Topic #	**Meeting Minutes for Topics**
1.	**Annual Vendor Inactivation Process** Each year, MyFloridaMarketPlace (MFMP) inactivates vendor accounts that have not conducted business with the State of Florida over the past two fiscal years. A communication was posted for vendors on the DMS website regarding the inactivation process prior to inactivation. The Vendor Inactivation Process job aid has been updated with exclusion criteria and instructions on how to handle outstanding transactions when vendors have been inactivated. This year's annual inactivation is scheduled for November 16, 2017. Vendor accounts will **not** be inactivated if any of the following seven criteria are met: • Has received an MFMP purchase order as of July 1, 2015 • Has received a payment from FLAIR or a PCard payment as of July 1, 2015 • Has made an edit to their Vendor Information Portal (VIP) account as of July 1, 2015 • Has logged into MFMP Sourcing as of July 1, 2015 • Office of Supplier Diversity Certified Business Enterprise certificate is valid as of July 1, 2014 • Is a member of the Florida Emergency Supplier Network • Is associated to a State Term Contract (STC) or Alternate Contract Source (ACS) in MFMP

A CRT attendee asked whether the inactivation occurs only on the core nine-digits of the vendor's FEIN or the vendor number which includes the FLAIR sequence number/location. FLAIR recognizes vendors at the location level, therefore only the FLAIR sequence number(s)/locations(s) that meet the criteria are inactivated.

Transaction Fee Exemption Updates

MyFloridaMarketPlace updated the transaction fee exemption codes in accordance with the revision of Rule 60A-1.031, Florida Administrative Code on **October 11, 2017**.
- Thirteen codes were updated to reflect the new exemption codes
- Three codes were deleted. If a customer has an existing transaction utilizing one of the deleted codes (1R, 1X and 2B), MFMP recommends that they process a change order to update the code

Old Exemption Code	Old Exemption Reason	New Exemption Code	New Exemption Reason
2A	Transaction is Critical to Agency's Mission or Necessary for Public Health Safety and Welfare	4	The transaction is critical to the agency's mission or necessary for the public health, safety, or welfare; and, imposition of the fee would prevent the consummation of the transaction.
2B	Imposition of the Fee would Prevent Consummation of the Transaction		

The Vendor Transaction Fee Dispute form was updated on the [DMS Website.](#)

The MFMP team created a Transaction Fee Exemption Crosswalk that is available on the [DMS Website.](#)

The following codes were removed from MFMP: 1R - Reluctant Vendor, 1X – Contracts Established After Rule Implementation, 2B – Imposition of the Fee would Prevent Consummation of the Transaction.

If an order exists with deleted exemption code 2B, a change order is necessary to update the exemption code to 4.

An [updated dispute form](#) reflecting the updated exemption codes has been added to the DMS Website, in case agency customers need to provide it to a vendor.

FLAIR Gap Effort

The annual FLAIR gap process determines if there is a **potential** gap of FLAIR payments and MFMP transaction fees billed in MFMP VIP for a vendor.

For the last two years, the MFMP team has conducted a vendor outreach to confirm the potential gap. Vendors review a list of invoices paid to them by state agencies, and determine if they have already been reported/billed and make additional payments, if needed.

The MFMP team began outreach with STC and enterprise-wide ACS vendors on October 30, 2017 for fiscal year 2016-17 payments.
- This year, the MFMP team has identified a potential STC and ACS recovery amount of $695,478
- Last year, the MFMP team recovered $304,273

	The FLAIR Gap process is useful in determining payments made directly in FLAIR. While DMS encourages use of MFMP for spend visibility, the transaction fee also cannot be billed if the payment is made directly in FLAIR. A CRT attendee asked how many years back the analysis goes. The FLAIR Gap analysis is completed for only the previous fiscal year. A CRT attendee also asked about conducting FLAIR Gap analysis for additional years. There have been discussions regarding going back to previous fiscal years, which would present a heavy workload for the MFMP FLAIR Gap analysis team. However, ad hoc FLAIR Gap analyses can be requested for vendors for previous fiscal years. A CRT attendee asked if we inactivate vendors that do not respond to FLAIR Gap outreach. Tyler Brown (MFMP) answered that he is not aware of any vendor that has been suspended to date.
4.	**IT Staff Augmentation eQuote Template** The MFMP team, in conjunction with DMS State Purchasing, is developing a proposed, new eQuote template specifically for the IT Staff Augmentation contract. This template: - Reduces eQuote development time for agency customers - Improves understanding of what is required for an IT Staff Augmentation request for quote (e.g. requires a statement of work) - Standardizes the content for vendors - Increases State Purchasing's visibility into utilization of the contract Training will be offered in January 2018 before the eQuote template goes live and in February 2018 after the template is implemented. The job titles have been pulled into the template directly from the IT Staff Augmentation contract. Agency customers will still need to confirm the job title with their CIO. A CRT attendee asked if the template makes management decisions for the CIO. The eQuote template gives the option for easy selection of job title for a consistent job title format for vendors. eQuote content will still need to be discussed with agency CIOs and uploaded into the eQuote template. There are also links in template with contract requirements. A CRT attendee asked if an eQuote template can be created for any new STC. As long as the contract is a STC, an eQuote template can be requested. A CRT attendee asked if eQuote templates are created for an enterprise-wide ACS such as the Computer Equipment, Peripherals & Services ACS. The DELL catalog has quote functionality currently built-in; however, creation of an eQuote template for any ACS may be requested and then reviewed and approved by State Purchasing before creation of any new templates.

	Training Updates All third and fourth quarter training registrations have been posted to the MFMP website. Training is an ongoing effort and materials are continually updated as system changes are made. MyFloridaMarketPlace training offerings can be viewed in a monthly calendar format on the MFMP website. The MFMP team recently updated all requisitioning-based trainings (webinars and workshops). • Tomorrow, the team will be hosting an Advanced Requisitioning webinar If you hear feedback from MFMP customers who have taken the Requisition 101 training who want more advanced training, Jillian Green (MFMP) encourages them to take the Advanced Requisitioning training. In October, the MFMP team trained a total of **113 agency customers** and **30 vendors** during statewide training in Tampa and Orlando. Does your agency have any training material needs? A CRT attendee asked if there is a training on approving requisitions. They have their own requisitioning training with a quiz, but they do not have an updated one for the requisition approver training. MyFloridaMarketPlace University (MFMP U) offers an online approver training with built-in quizzes. The MFMP team offered to send the link to this training. A CRT attendee asked how other agencies certify training. Several agency representatives mentioned their use of completion certificates, passing scores on quizzes and inclusion of MFMP U links in their specific agency training. A customer asked if the Panhandle is being targeted for training. Jillian Green (DMS) mentioned that local training is tentatively scheduled for the spring 2018. A CRT attendee mentioned that none of the job aid titles indicate when or if the job aid has been updated. They requested an update to the manuals and job aids Web page to add a date to the titles to indicate when the job aid was updated. Jillian Green (MFMP) asked if agencies would like to receive a communication when job aids are added or updated. Several agency representatives responded, only if the communications are sent consistently for all job aids. Betsy Chance (MFMP) stated that MFMP will take back the request to add dates to job aid and manual titles for consideration.
5.	
	Annual Customer Survey Customers were asked to provide feedback on overall satisfaction, system response time, the customer service desk, training, communications and reporting. • Thanks to all **1,042 customers** who participated!
6.	

	The MFMP team is reviewing all customer feedback and is using it to develop a detailed action plan to improve areas where customers indicated dissatisfaction. Final survey results will be communicated in the next CRT meeting. Betsy Chance (MFMP) mentioned that the Annual Customer Survey is a tool used to gauge how effectively MFMP is working and gave kudos to the MFMP team for preliminary 96% satisfaction rate and thanked participants for completing the survey.
7.	**Open Forum** These meetings are intended to: • Discuss issues and concerns from agencies • Identify and review improvements to MFMP applications, training and/or communications • Allow agencies to discuss internal process/policies with each other After each meeting, the MFMP team will: • Review feedback and determine next steps (e.g., create change request, find existing change request number, provide training material, follow-up for additional context, etc.) • Contact the originator to discuss the status of their feedback **Editing Line Items** A CRT attendee mentioned that there was an MFMP change that locked the editing of line item details on agency term contracts. The customer asked why this change impacted agency term contracts so that the line item descriptions cannot be updated (for example, the addition of a ship-to address for envelope printing). The customer mentioned that they have contacted the customer service desk to express concern but were told that there is nothing that can be done as a workaround. A CRT attendee mentioned that for their legal agency term contracts, each line item is a term and the line item description may need to be updated. The customer mentioned that if the invoice description doesn't match the contract then the invoice will not be approved, which may cause delays in payment. The customer currently adds a comment as a workaround but would prefer to be able to change the description on the requisition. MyFloridaMarketPlace implemented change request 310 to prohibit changes to the line item description or part number on requisitions against a punch-out or line item catalog specifically. The change was implemented to prevent Office Depot, for example, from receiving orders with changed descriptions as they cannot complete these because the updated line item descriptions do not match the catalog. This change assumes that the description for all line-level contracts, including departmental contracts, would not be changed. The exclusion of departmental contracts will be explored as a future update to this system enhancement.

Vendor Selection and Valid W-9

Brian Cliburn (MFMP) discussed an issue previously brought up regarding vendors that are available for selection in Buyer but fail FLAIR because the vendor does not have a valid W-9 status on file in FLAIR. The MFMP team researched this issue and found that that there are a number of these vendors in MFMP without a valid W-9 on file in FLAIR because many of these vendors are paid via a Purchasing Card (PCard). Although there is no resolution yet, MFMP is still working with DFS for options to reduce the number of invalid W-9s. More information will be provided in the next meeting.

A CRT attendee asked why PCard vendors do not have to go through W-9 validation.
Brian Cliburn (MFMP) answered that PCard payments are immediate payments paid by the PCard vendor, Bank of America, so vendors get payment without going through FLAIR first.

Access to Training Environment

A CRT attendee mentioned they couldn't get into the training environment recently. Other agency representatives mentioned that there have been times where they were unable to log into the training environment. Brian Cliburn (MFMP) mentioned that agency customers should always be able to access the training environment during standard business hours and that they should contact the customer service desk if they are unable to access it.

Brian Cliburn (MFMP) also confirmed that a change was made in the training environment that is browser specific and asked if anyone from MFMP has followed-up with them regarding accessing the training environment and stressed that MFMP needs to know who were impacted.

MyFloridaMarketPlace has a list of people who have confirmed they could not access the training environment and will be contacted by MFMP soon to discuss. Customers are encouraged to contact the customer service desk if they are unable to access the training environment at any time.

Printing Orders

A CRT attendee mentioned that the print button is not available on previous versions of an order. When an order has changed, they create screenshots that identifies what changed on the order because all of the changed line comments are confusing. The customer asked if there is a reference guide for the changes that are reflected on the history tab of an order that has changed. Another CRT attendee suggested clicking the *Change* button in the history to review pertinent changes.

Brian Cliburn (MFMP) answered that there are materials to address this, and will work with the CRT attendee to provide the materials.

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

Action Items					
#	Action Item Description	Assigned To	Status	Due Date	Comments
1.	Distribute the Approving Requisitions online training	MFMP	In Progress		
2.	Explore communicating and updating job aid and manual updates with latest revision dates	MFMP	In Progress		
3.	Develop reference guide for history tab changes	MFMP	In Progress		
4.	Continue working with DFS regarding vendors available in Buyer that do not have a valid W-9	MFMP	In Progress		
5.	Explore the exclusion of departmental contracts as a future update to CR310	MFMP	In Progress		