



Interoffice Memo

DATE: February 21, 2023

PHONE: 388-0849

FROM: **BEVERLY SNIDER, SUPERVISING FISCAL SPECIALIST**
Behavioral Health, Fiscal Services

TO: **BEHAVIORAL HEALTH**

SUBJECT: **QUICK REFERENCE FOR PROCUREMENT – PURCHASE REQUESTS AND
ERGONOMIC/MEDICAL ACCOMMODATION REQUESTS**

This memo serves as a guide to assist in completing procurement requests for all purchases including equipment and supplies based on ergonomic assessments and/or medical accommodations.

In order to procure services and/or materials a payment mechanism and authorization by the appropriate internal and external approvers is required prior to purchase.

When submitting a purchase request, the Procurement section of Fiscal Services requires a complete and accurate purchase request, any approvals, up to date quotes, and any other pertinent information submitted to ensure immediate processing of the order. Incomplete requests will delay your request.

Workflow: In order to more efficiently facilitate the Fiscal Budget Unit review for purchase requests and ergonomic/medical accommodation related items, the approval workflow requires the following approval levels:

Purchase Request

- Supervisor: Up to \$100
- Program Managers: \$100 to \$1,000
- Program Deputy Director: \$1,000 and above
- Deputy Director of Administrative Services: \$5,000 and above
- Director or Assistant Director: \$10,000 and above.

ERGO/Medical Request

- Supervising Medical Emergency Planning Specialist : up to \$1,000
- FPM Supervisor: up to \$1000
- Fiscal Administrative Manager: up to \$5000
- Administrative Manager (FPM & D&S): up to \$5000
- Deputy Director of Administrative Services: \$5,000 and above

Below are the required items to process a Purchase Request:

- A minimum of three quotes or Sole Source Justification is required for any expenses in excess of \$1,000. Quotes can consist of any one of the following:
 - a. Online quote as screen shots of the vendor form filled out
 - b. E-Mail quote with details describing the quote is good for 30 days or more.
 - c. Phone quote that includes a contact person, the date of contact, and language describing the quote is good for 30 days or more.
 - d. **EXCLUSIONS for multiple quotes:** For office furniture you will need to request a minimum of three quotes from the County Contracted Furniture Vendor. Staples orders do not require three separate quotes nor do they require Sole Source justification form.
 - e. **If you have tried to obtain quotes with no success include that information as a non-responsive quote.**
- Detailed Order (color, quantity, amount including shipping, screen shot, etc.)
- A “**need by**” date
- Note “ERGO” or “MEDICAL” in WHAT IS NEEDED field and in the email subject line to ensure **immediate processing**.
- Include copy of FPM Ticket originating from:
 - a. Disaster and Safety for Level 2 & 2.5 ergonomic assessments
 - b. DBH Human Resources for medical accommodations
- If a **NEW** vendor: Contact Procurement for the current W-9 form and have the vendor fill it out. Submit the completed signed form with the purchase request. Allow 1 week for the W-9 to be processed.

DBH Procurement will review the request for completeness and inform the requestor of any additional items needed.

Special Circumstances:

- Any IT equipment or software request needed for special ergonomic or medical necessity needs must include verification that the request has been reviewed and approved by DBH-IT, and HR BP (for medical necessity/accommodations only).
- Agreements from vendors must be reviewed by County Counsel. This may take several days. Agreements will need to be in compliance of County Policies for standard contract terms. [Please refer to the County policies below for reference:](#)
 - a. County Policy 11-06 Contracting Standards
 - b. County Policy 11-05 Non-Standard Contract Language
 - c. County Policy 11-07 & 11-07SP Insurance and Indemnification Policy and Standard Practice

- Public work projects, facility improvements, of \$1,000.00 or more must meet prevailing wage requirements.
- **Sponsorships** and attendance to sponsorship events requires specific documentation for approval. **Please contact DBH Procurement for Auditor/Controller Memo 130102 for specific instructions.**

Note: Every order is unique and may require other requested items. For additional information on County Procurement policies and, please refer to the [County Procurement Manual](#).

If there are any questions please contact the Procurement or Fiscal Services Budget supervisors, **Beverly Snider** at 388-0849 or **Tobi Babalola** at 388-0825.