BUYING TEAM ELECTRONIC DOCUMENTS

Standard Operating Procedures

Introduction & Overview

In light of the COVID-19 pandemic, many business practices need to be adjusted. The shift to electronic records provides a lower exposure during document transition between buying team members and incident agency. The change also facilitates documentation sharing via electronic methods as there may be increased functions performed remote.

Benefits:

- Standardized file structure allows for reduction of workload and hard copy documentation packages.
- Electronic records are searchable.
- Hard copy packages do not have to be sent back to incident agency after buying team members have finalized payments, the packages can be emailed or uploaded into the system of record.
- Sharing of records is substantially easier. This process will alleviate the need for individual purchases to provide documentation to the claim settlement or cooperative resource group for cost share, FEMA, or reimbursement request.

Challenges:

- Files contained on an external hard drive are considered "temporary" and agencies would be responsible to transition to the official system of record.
- Buying teams do not travel with high capacity scanners as a course of business. Ability to rent equipment would be more expensive for the operating cost of buying teams.
- Buying teams provide interagency support, agencies documentation requirements vary depending on the incident agency.

Electronic Filing System Setup: (External drive or electronic folder such as Pinyon)

- 2020 Incidents
  - Incident Folder
    - Separate folders are to be set up within the incident folder as follows:
      - Buying Team Documentation
      - Buying Team Spreadsheets
      - Emergency Equipment Rental Agreements
      - Land Use Agreements
      - Pending Documents
      - Property Transfer Forms
      - Receipts
        - Vendor Names
          - Package Names
      - Transition Documents

See Exhibit 01 for naming conventions for each of the above folders.

> *Note: All dates are in format YYYYMODA i.e. 20200510*
> *No special Characters*
> *All scanning should be done upright and same direction for ease of review.*

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Table 1.

Document Type	Naming Convention	Example
Incident Folder	Name_Number_JobCode	Museum Fire_CA-SHF-00144_P5D6EK
Sub folders under each incident		
Buying Team Documents	DelegationofAuthority_BT Leader Name OF288_BT Members First/Last Name If applicable: CTR_BT First/Last Name Warrant_FirstLastName	DelegationofAuthority_JaneSmith OF288_JaneSmith CTR_JaneSmith Warrant_JaneSmith
Buying Team Spreadsheet	FireName_BT Spreadsheet_YearMonthDay	WoodburyFire_BTSpreadsheet_20200519
Emergency Equipment Rental Agreements	EERA_Vendor Name_Agreement Number Modifications notes with MOD then number.	EERA_MountainSky_1283Z220K5016 EERA_MountainSky_1283Z220K5016_Mod 1
Land Use Agreements	LUA _Vendor Name_Agreement Number Modifications notes with MOD then number.	LUA_CityofRedmond_1283Z220K5015 LUA_CityofRedmond_1283Z220K5015_Mod 1
Pending Documents	Vendor Name_Resource Order Number(s)_Description	UnitedRentals_S35_LightTowers CityOfOakland_S94_GreyWaterDisposal
Property Transfer Forms	Property Form Number_resource order number _Type of Item	AD107_ S234_4TBHardrive
Receipts (Final and paid documents)	**Vendor Folders** *Note: spell out full vendor name **Receipt Packages:** Vendor Name_Date of purchase_Resource Order Number(s)_Dollar amount **Package Order: (top down)** 1. Completed waybill 2. Receipt/invoice 3. Any other supporting documentation (i.e. emails, commercial agreement, credit card purchase order form per agency etc.) 4. Resource Order	**Example:** Walmart NapaAutoParts (NOT Napa) **CHARGES:** **Single S#** HomeDepot_20200510_S24_201.44 CityOfHelena_20200511_S558_81.69 Walmart_20200510_S71_65.99 Walmart_20200510_S104_97.62 **Multiple S#** Walmart_20200510_S289-S312_75.93 Walmart_20200512_S384,385,389,391_61.83 **CREDITS:** HomeDepot_20200513_S24_(201.93)
Transition Documents	Incident Name_TransitionDoc_Buying Team Name_Date	WoodburyFire_TransitionDoc_SouthwestBuyingTeam_20200520