



2nd Quarter 2024

## SUPPORT SERVICES NEWSLETTER

### Hello Again, Lucas County!

Support Services plays a vital role in the operations of Lucas County departments and agencies. In this edition we will showcase what we do, revisit important topics, and share what is upcoming.

Have questions? We are ready to provide support! Our contact information is listed below, but for general questions, simply email [purchasing@co.lucas.oh.us](mailto:purchasing@co.lucas.oh.us).

### Staff Directory

Mary Kunckel—419-213-4508  
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Michelle Upchurch—419-213-4521  
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Terina Jaynes—419-213-2130  
Purchasing Oracle Lead  
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Christine Li—419-213-4465  
Purchasing Assistant II  
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Alexandra Ialacci—419-213-4513  
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Marsha Bochi—419-213-4509  
Support Service Clerk  
[mbochi@co.lucas.oh.us](mailto:mbochi@co.lucas.oh.us)

### Keep the Gov Deals Auction Items Rolling In

So far in 2024, Support Services has auctioned over 40 items on GovDeals for various departments and agencies. That is double from last year! From shredders to shelving units to vehicles. It is a great way to declutter and put money back in your department's budget.

We have worked hard to streamline the process and CeCe Burton is ready to assist you with your requests.

Any County owned obsolete or surplus item must be declared as such via signature from the County Administrator. If the value of the item is under \$2500 it may be disposed, donated, or auctioned on Gov Deals. Property with a FMV of \$2500 or greater must be auctioned on GovDeals.

To begin, email the completed Surplus & Obsolete Declaration form to [purchasing@co.lucas.oh.us](mailto:purchasing@co.lucas.oh.us). From there, Support Services will obtain signatures from Administration and return the signed form to you with next step instructions based on what you want done with the items.

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### Department Info

**One Government Center**  
**Suite 480**  
**Toledo, OH 43604**  
**Main Line: 419-213-4519**  
**Fax Line: 419-213-4533**

**Business Hours:**  
**Monday—Friday**  
**8:30 am—4:30 pm**



**Looking for a particular form or policy? Find it on our webpage**  
**[Support Services | Lucas County, OH - Official Website](#)**



## From the Mail-Room: A Much Needed Upgrade

We have a happy mail-clerk!

A new mail machine was recently installed. Your patience is greatly appreciated as our staff learns the new equipment and its functions.

Does your department or agency use Mail-It for mass mailings? If so, please let Mary know.

Does your office have a stack of unwanted inter-office envelopes? Support Services wants them!

To ensure same-day processing, mail should be dropped off **by noon**. Two pieces or more should be rubber banded together. The department account code should be clearly listed on the envelope.

Thank you for continuing to contact Marsha Bochi when your department has a bulk mailing (100 pieces or more).

## Be on the Lookout!

Support Services is hard at work to create, update, or streamline various checklists, forms, links, and policies. Here are a few things we are currently working on. Stay tuned....we look forward to sharing with you soon:

- Contract checklist
- Request for quote form
- RFP scope of work and tabulation templates
- Link to State Contracts and Cooperative Agreements
- Updating P-card Policies & Procedures



Meeting your purchasing needs is an important function of our department. Let us know your pain points. *What would you like to see us work on?*

### REMINDER: Current Purchasing Tiers

- **Tier 1 Purchases** are from \$0.01-\$999.99 — no quote is required
- **Tier 2 Purchases** are from \$1,000.00—\$7,499.99—one quote is required
- **Tier 3 Purchases** are from \$7,500.00—\$74,999.99—three quotes are required
- **Tier 4 Purchases** are from \$75,000.00 and greater—there must be a competitive

## Did You Know?

You do not have to submit a work order request through LCIS to ask for delegate access. Email Terina Jaynes or Michelle Upchurch with complete name, including the middle initial.

Do you need an expense report that has already been submitted reassigned to a different approver within your department? Michelle Upchurch can help with this!

Do you need to post an item to multiple funding streams in an expense report? This can be done! Use Lucas Purchase Card as the template and Contract Services—Itemized as the type. Call Michelle or Chrissy with any questions.

The bank account you have set up in the Oracle expense module to receive reimbursements may differ from the bank account you have set up for payroll? This is especially true if you have ever changed banking info as it may not automatically update in the expense module. We have job aide to assist. Contact Chrissy or Michelle!

## Competitive Bidding & RFP Process

We asked and you listened!

Support Services should be involved with your competitive bidding or RFP process on all goods, services, and professional services from start to finish. We currently have 15 active RFPs.

Contact Mary to schedule time to discuss specifics.



***Remember to contact Support Services if your department is looking to purchase, lease, or dispose of a vehicle***



## Making Purchase Orders Easy to Understand

**Requisition from a Quote** — Normal, routine purchases. Required documentation: email, quote, requisition/purchase order request form.

**TAN** — When entering a requisition from an invoice. Money should be encumbered prior to getting the invoice. When that doesn't happen, it is a Then and Now scenario and must be identified in the description. Support Services submits a monthly resolution to the BCC for their approval of the TAN report as required by the ORC. Requisitions entered from an invoice without being identified as a TAN in the description box will be rejected.

**Blanket Purchase Order**—This is used to purchase a variety of items over a specified period of time. It is limited to the current fiscal year and must be closed before year-end, EVEN if invoices are received in January that were generated in December. Blanket purchase orders over \$1000 must be passed by resolution. This allows the department to receive and invoice multiple times on the same purchase order. You must identify the blanket purchase order by typing BPO in the description box.

**Super Blanket Purchase Order**—This is used for certain expenditures that are recurring and reasonably predictable. Services of an accountant, attorney at-law, physician, professional engineer, construction project manager, consultant, surveyor or appraiser by or on behalf of the subdivision or contracting authority. Fuel oil, gasoline, diesel, food items, roadway materials, and utilities. Any purchases exempt from competitive bidding under the ORC 125.04. Requests must come to Support Services so that a resolution can be passed. This allows the department to receive and invoice multiple times on the same purchase order. It cannot extend beyond the current fiscal year. You must identify the super blanket purchase order by typing SBPO in the description box.

**Purchase Orders with Contracts**—When the BCC passes a resolution for a contract, the department can then create a requisition to encumber the funds for the authorized contract amount. The resolution and signed contract must be attached. This allows the department to receive and invoice multiple times on the same purchase order. It is not limited to the current fiscal year and can carry forward.

**Contract Purchase Agreements**—This prevents departments from exceeding the dollar amount that has been authorized by the BCC via a resolution. A CPA does not encumber the funds. It is only a tracking tool in Oracle to ensure that spend is within the authorized amount. Supporting documentation such as the resolution, contract, and insurance must be emailed to Support Services with the CPA request. This information is then saved in Oracle. When creating a requisition using a CPA number, the requisition bypasses Support Services and a purchase order is automatically generated.

### New-User & Refresher Training

Support Services new conference room is open for business! Come see our bright and spacious room.

Terina Jaynes will be reaching out to departments to schedule new-user or refresher trainings.

As the County moves to Oracle Redwood, Terina will update job aides to ensure they are cohesive to the new format.

Support Services does not offer assistance or training on the invoicing portion in the procurement process as that is an Auditor's office function.

## A Seat At Your Table

Mary Kunckel and Michelle Upchurch want to attend your next staff meeting!

We have noticed that the employees who are making purchases aren't necessarily the ones who are doing the day-to-day work in Oracle to pay the bills. Sometimes there is a lack of understanding. We would like to fix that!

Allow us the time to touch on what Support Services does and answer any questions your staff may have.

We have received positive feedback from the staff meetings that we have attended. As Support Services strives to improve our department functions, your input is valuable.

We look forward to putting faces with names. Contact us today!



## Boosting Diversity Spend!

Lucas County expanded its partnership through a cooperative agreement with Amazon last year. To-date, Lucas County has spent \$85,865.28 with diverse suppliers! Lucas County has set preferences to purchase from local, MBE, and sustainable businesses. This gives Lucas County the opportunity to keep tax payer dollars local when possible.

Do your part to increase the County's diversity spend! If your department or agency has not signed up under the centralized Lucas County Amazon Government Business Account and would like to, please contact Mary Kunckel to get registered.

Checkout is easy! Our tax exemption is automatically honored and payment options include using a p-card at each checkout or billed monthly and pay via the traditional payment process in Oracle.

However, navigating through Amazon's credit memos is not easy. Contact Mary if you are experiencing any issues.

## Travel & Expenses

### Employee Reimbursement Reports

Support Services audits expense reports according to policy to ensure that the documentation matches what is entered into Oracle. All receipts must be itemized AND show proof of payment. This is non-negotiable. In addition, your reimbursement request may require additional documentation. Such as a contract article, event flier, signed travel authorization forms, mileage logs, etc.

In lieu of a missing receipt or proof of payment, a bank statement may be attached as well as an affidavit.

Keep in mind — the Auditor's office audits according to policy to process payment and ensure it has valid public purpose.

Asking for this information is a necessity as it could be required by the Ohio Revised Code or by the State Auditor.

Chrissy Li will be reaching out to schedule refresher training on expenses and is only an email away if you have any questions.

### P-Card & Travel Card

Thank you for adhering to submission instructions and deadlines when submitting an expense report to reconcile your statement!

Before you hit that submit button, make sure your expense report total matches your statement total and it reads employer pays card issuer, NOT employer pays you.

FYI: please post all p-card or travel card pay-ins to: **8040.810080.19.417004.00000.00000**

If your County agency or department is not enrolled in the procurement card program and would like more information, please contact Michelle.

