

EREQ CARF - Job Aid (Version 1 January 22, 2019)

1. Please enter date submitted.

| | | |
|----|-----------------------|----------------------|
| 10 | Date Submitted | <input type="text"/> |
|----|-----------------------|----------------------|

2. Please enter Buyer Name.

| | | |
|----|-------------------|----------------------|
| 11 | Buyer Name | <input type="text"/> |
|----|-------------------|----------------------|

Please enter the Manager Approving the CARF.

| | | |
|----|-------------------------------|----------------------|
| 12 | Manager Approving CARF | <input type="text"/> |
|----|-------------------------------|----------------------|

3. Please select one of the following from drop down.

| | | |
|----|--|---------------------|
| 14 | Please select one of the following: | <<<PLEASE SELECT>>> |
|----|--|---------------------|

Requisitioner
 Approver
 Requisitioner/Approver(Both)

2. Is employee leaving the hospital? Y or N

| | | |
|----|---|---------------------|
| 16 | Is the employee leaving hospital ? | <<<PLEASE SELECT>>> |
|----|---|---------------------|

It is important for EREQ support to know whether to shut the user account down completely, or just for certain cost centers because they are switching departments.

3. Only one user (Requisitioner or Approver) per CARF form.

17 ONLY ONE USER PER CARF FORM

4. EREQ User Name information must be filled out completely for each user (Requisitioner or Approver)

| | | | | | | |
|----|---|------------------|--------------|-----------|----------------------------------|--|
| 18 | E-Req USER NAME INFORMATION: | | | | | |
| 19 | **Skip User Name section, if adding/changing or deleting a unloading point only | | | | | |
| 20 | First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address |
| 21 | JENNIFER | BRACKEN-LAFOREST | 613-549-6666 | X4109 | Kingston General Hospital (KG01) | Jennifer.Bracken-Laforest@kingstonhsc.ca |

Correct e-mail address is important as all EREQ shopping cart communications rely on this piece of data. Approvers receive an e-mail from EREQ to approve Shopping Carts. Requisitioners receive an e-mail when a Shopping Cart has been rejected.

5. Please include any extra instructions in the additional notes box.

| |
|--------------------------|
| Additional Notes: |
| |

Examples:

- User is being deleted because they retired.
- E-Mail address has changed, user got married.
- User last name changed.
- E-mail address needs corrected.

6. The next section is for the requisitioner data (not necessary for APPROVER ONLY)

ACTION

ADD NEW USER – When selecting add new user, the buyer will fill in all the information from column A – W.

COST CENTER DATA

Requires an SAP Cost Center

- BGH Cost Centers begin with “B”
- LAH Cost Centers begin with “L”
- KHSC – <=4 Letters ie OR, ENDH, etc
- PCC Cost Centers begin with “P”
- PSF Cost Centers begin with “S”
- QHC Cost Centers begin with “Q”

Each cost center for the user will require a new row. The buyer identifies the users default cost center with an X.

| ACTION | Cost Center | |
|-------------------|-----------------|--------------------------------------|
| ADD/CHANGE/DELETE | SAP COST CENTER | DEFAULT COST CENTER (mark with X) |
| ADD NEW USER | ENDH | X |
| ADD NEW USER | ENTH | |
| ADD NEW USER | AUDH | |

Should the user create require more cost centres than lines available on CARF please add in as many additional lines as needed.

UNLOADING POINT INFORMATION

(Use SQ01 UNLDPOINTS to find current unloading points)

| Recipient | Plant | Unloading Point | Name | Bldg | Floor | Room | Email | Phone | Route | Start Date | End Date |
|------------|-------|-----------------|-------|------|-------|--------|-------|-------|-------|------------|------------|
| 0000003799 | BG01 | CSSGNG-009DI CT | DI CT | CSS | G | NG-009 | NA | NA | NA | 2018/05/28 | 9999/12/31 |

If the unloading point needs to be built, enter the following information

SITE/PLANT CODE (choose applicable code) - BG01, BG02, HD01, KG01, LA01, PM01, SML1, PE01, SF01, BL01, NH01, PEC1, TM01

DEPARTMENT OR DEPARTMENT TITLE, ie, ICU or ICU MANAGER

BUILDING – attached sheet with building abbreviations – APPENDIX A

FLOOR – G,0,1,2,3,4,5...

ROOM - If building code and floor are included in room # please remove, ie 22.1.003.0 enter as .003.0 ensure you use a period before any room beginning with a 0, this will ensure number is correctly portrayed in the spreadsheet. The 22 represents KIDD/DAVI and has already been entered for building and floor is 1 and has already been entered.

If there is only one unloading point, the buyer will only enter the Site, Dept or Manager Title, Building, Floor and Room once. If there is a need to build multiple unloading points for the user then this information will need to be completed for each one. The buyer identifies the default unloading point by marking with an X.

NOTE: If there is an existing unloading point the buyer can copy from the Query SQ01 UNLDPOINTS – ie. CSSGNG-009DI CT and paste in the Existing Unloading Point Box if found.

| Unloading Point Information | | | | | | |
|-----------------------------|-----------------------|----------|-------|--------|---------------------------------------|--|
| SITE/PLANT CODE | DEPT or MANAGER TITLE | BUILDING | FLOOR | ROOM | DEFAULT UNLOADING POINT (mark with x) | EXISTING UNLOADING POINT(IF FOUND IN SQ01 QUERY) |
| BG01 | ICU | CSS | G | NG-118 | | |
| BG01 | ER/ICU MGR | CSS | G | NG-107 | | |
| | | | | | X | CSSNG-009DI CT |

LIMIT = the requisitioners purchasing limit. BGH & KHSC = \$.01. Each site has a policy around these dollar values. At other sites limits may be set by the individual's manager or director. Buyer is responsible for gathering this information and entering in the space provided.

| |
|---------------------------|
| LIMIT |
| USER PURCHASE LIMIT |
| 0.01 |

APPROVER - The buyer is required to enter Approver Information for each of the cost center covers. If an approver is not yet set up, then a CARF must be submitted to get the approver established first. Each approver requires full name, email address and approval limit which is set out by each hospitals existing purchasing/finance Policies and Procedures. If the approver is an existing approver for a cost center, then user name and limit are sufficient.

The buyer can find this by using SQ01 Query - EREQUSERS

Example: Cost Center AUDH

| 3SO eReq User List | | | | | | | |
|--------------------|----------|-----|-----------|-----------|-----------|---------------------|-------|
| 3SO eReq User List | | | | | | | |
| User Name | Cost Ctr | N.. | User Name | User Name | User Name | User Approval Value | Curr. |
| CORNISHD | AUDH | 02 | VARETTEP | CRAWFOS3 | | 0.01 | |
| HENNIGR | AUDH | 02 | VARETTEP | CRAWFOS3 | | 0.01 | |

This indicates the Approver 1 is VARETTEP and Approver 2 is CRAWFOS3.

SQ01 Query EREQAPPROVERS can be used to find approver limits.

| 3SO eReq Users Approval Value | | | | |
|-------------------------------|--------------------|-------|--------------------|-------|
| 3SO eReq Users Approval Value | | | | |
| User Name | APPROVERLOWERLIMIT | Curr. | APPROVERUPPERLIMIT | Curr. |
| VARETTEP | | 0.00 | 100,000.00 | |

| 350 eReq Users Approval Value | | | | | | |
|-------------------------------|-----------|--------------------|-------|--------------------|--------|---|
| | | | | | | |
| 350 eReq Users Approval Value | | | | | Status | / |
| <input type="checkbox"/> | User Name | APPROVERLOWERLIMIT | Curr. | APPROVERUPPERLIMIT | Curr. | |
| <input type="checkbox"/> | CRAWFOS3 | 0.00 | | 500,000.00 | | |

Example of Approver 1 filled in.

| Approver 1 | | | |
|---------------------|------------------------------------|----------------|--|
| Name | EMAIL Address | Approval Limit | SAP Approver User ID (when approver already exists in SAP) |
| Paula Varette-Cerre | Paula.Varette-Cerre@kingstonhsc.ca | 100,000.00 | VARETTEP |

Example of Approver 2 filled in.

| Approver 2 | | | |
|-----------------|--------------------------------|----------------|--|
| Name | EMAIL Address | Approval Limit | SAP Approver User ID (when approver already exists in SAP) |
| Sylvie Crawford | Silvie.Crawford@kingstonhsc.ca | 500,000.00 | CRAWFOS3 |

ADD APPROVER

To add an approver select ADD APPROVER from the drop down list and enter the SAP COST CENTER, the Approval Limit and the SAP Approver User ID if known. If the User ID is not known buyer will enter Name and EMAIL Address of Approver. Please ensure that the addition is noted at the correct level, Approver 1, Approver 2 or Approver 3.

| ACTION | Cost Center | | Approver 1 | | | |
|-------------------|-----------------|-----------------------------------|------------|---------------|----------------|--|
| ADD/CHANGE/DELETE | SAP COST CENTER | DEFAULT COST CENTER (mark with X) | Name | EMAIL Address | Approval Limit | SAP Approver User ID (when approver already exists in SAP) |
| ADD APPROVER | AUDH | | | | 100,000.00 | VARETTEP |

Filling in unloading point information is not required for this type of request.

DELETE APPROVER

To delete an approver select DELETE APPROVER from the drop down list and enter the SAP COST CENTER and the SAP Approver User ID if known. If the User ID is not known buyer will enter Name and EMAIL Address of Approver. Please ensure that the deletion is noted at the correct level, Approver 1, Approver 2 or Approver 3.

| ACTION | Cost Center | | Approver 1 | | | |
|-----------------|-----------------|--------------------------------------|------------|---------------|----------------|--|
| | SAP COST CENTER | DEFAULT COST CENTER (mark with X) | Name | EMAIL Address | Approval Limit | SAP Approver User ID (when approver already exists in SAP) |
| DELETE APPROVER | AUDH | | | | | DEVETTEJ |

Filling in unloading point information is not required for this type of request.

NOTE: If a buyer needs to change an approver on a cost center submit an Approver CARF filling in Approver Data Only - Replace Current Cost Center Approver. See below for instructions.

ADD/CHANGE/DELETE COST CENTER

Often a user will move areas in the hospital and cost centers will be added or deleted. Change can be used if the cost center was keyed in incorrectly. Again for these types of requests unloading point information is not required.

| REQUISITIONER DATA | | |
|--------------------|-----------------|--------------------------------------|
| ACTION | Cost Center | |
| ADD/CHANGE/DELETE | SAP COST CENTER | DEFAULT COST CENTER (mark with X) |
| ADD COST CENTER | B1A13540 | |
| DELETE COST CENTER | B1A26250 | |
| CHANGE COST CENTER | B1A3501560 | |

Above shows adding cost center B1A13540 and deleting cost center B1A26250 from a requisitioners profile. Change cost center shows the new cost center B1A3501560 when an error was made with an entry. It is important to indicate in the additional notes the change.

Additional Notes:

Change cost center B1A3501561 (not a valid cost center) to B1A3501560

ADD/CHANGE/DELETE UNLOADING POINT

A user or site may require an additional unloading point, a change to an unloading point or deletion of an unloading point. It is not necessary to enter approvers or cost centers for this type of request.

| Unloading Point Information | | | | | | |
|-----------------------------|-----------------------|----------|-------|--------|---------------------------------------|--|
| SITE/PLANT CODE | DEPT or MANAGER TITLE | BUILDING | FLOOR | ROOM | DEFAULT UNLOADING POINT (mark with X) | EXISTING UNLOADING POINT(IF FOUND IN SQ01 QUERY) |
| | | | | NG-117 | X | CSSGNG-118ICU |

The user may be changing office space in their department and the room number needs updated. Enter the correction in the spreadsheet along with the existing unloading point.

Additional Notes are helpful here as well although not necessary.

| Additional Notes: |
|---|
| Unloading point room change from NG-118 to NG-117 |

CHANGE COST CENTER DEFAULT TO – enter cost center and mark with X
NOTE: E-Req support will automatically remove the X from the current default cost center.

| ACTION | Cost Center | |
|-------------------------------|-----------------|-----------------------------------|
| ADD/CHANGE/DELETE | SAP COST CENTER | DEFAULT COST CENTER (mark with X) |
| CHANGE COST CENTER DEFAULT TO | B1A13540 | X |

CHANGE UNLOADING POINT DEFAULT TO – enter unloading point and mark with X
NOTE: E-Req support will automatically remove the X from the current default unloading point.

| ACTION | Cost Center | | Unloading Point Information | | | | | | |
|-----------------------------------|-----------------|-----------------------------------|-----------------------------|-----------------------|----------|-------|------|---------------------------------------|--|
| ADD/CHANGE/DELETE | SAP COST CENTER | DEFAULT COST CENTER (mark with X) | SITE/PLANT CODE | DEPT or MANAGER TITLE | BUILDING | FLOOR | ROOM | DEFAULT UNLOADING POINT (mark with X) | EXISTING UNLOADING POINT(IF FOUND IN SQ01 QUERY) |
| CHANGE UNLOADING POINT DEFAULT TO | | | | | | | | X | CSSGNG-118ICU |

OR

| ACTION | Cost Center | | Unloading Point Information | | | | | |
|-----------------------------------|-----------------|-----------------------------------|-----------------------------|-----------------------|----------|-------|--------|---------------------------------------|
| ADD/CHANGE/DELETE | SAP COST CENTER | DEFAULT COST CENTER (mark with X) | SITE/PLANT CODE | DEPT or MANAGER TITLE | BUILDING | FLOOR | ROOM | DEFAULT UNLOADING POINT (mark with X) |
| CHANGE UNLOADING POINT DEFAULT TO | | | BG01 | ICU | CSS | G | NG-118 | X |

CHANGE USER INFO

Information for a user may need to be updated.

CHANGE USER INFO option would be used if cost center, unloading point and approver information needed to be changed.

| ACTION | Cost Center | | Unloading Point Information | | | | | | LIMIT | Approver 1 | | | | |
|--|-----------------|-----------------------------------|-----------------------------|-----------------------|----------|-------|--------|---------------------------------------|--|---------------------|------|---------------|----------------|--|
| | SAP COST CENTER | DEFAULT COST CENTER (mark with X) | SITE/PLANT CODE | DEPT or MANAGER TITLE | BUILDING | FLOOR | ROOM | DEFAULT UNLOADING POINT (mark with X) | EXISTING UNLOADING POINT(IF FOUND IN SQ01 QUERY) | USER PURCHASE LIMIT | Name | EMAIL Address | Approval Limit | SAP Approver User ID (when approver already exists in SAP) |
| CHANGE USER INFO(USER INFO, COST CENTER, UNLOADING POINT, APPROVER INFO) | B1A3501560 | X | | | | | NG-117 | X | CSSGNG-118ICU | | | | 150,000.00 | VARETTEP |

Again, additional notes assist in the explanation of changes required.

| Additional Notes: |
|---|
| Cost Center change from B1A3501561 to B1A3501560. Unloading point room change from NG-118 to NG-117. VARETTEP Approval limit changed from 100000 to 150000 |

EREQ relies on accurate e-mail information, if this needs to be updated, please enter in the EREQ user information and ensure to indicate in the Additional Notes box that e-mail address needs to be updated.

| E-Req USER NAME INFORMATION: | | | | | | | Additional Notes: |
|---|------------------|--------------|-----------|----------------------------------|---------------------------------|--|--|
| **Skip User Name section, if adding/changing or deleting a unloading point only | | | | | | | Change e-mail from Jennifer.Bracken-Laforest@kingstonhsc.ca to Jennifer.Bracken@kingstonhsc.ca |
| First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address | | |
| JENNIFER | BRACKEN-LAFOREST | 613-549-6666 | X4109 | Kingston General Hospital (KG01) | Jennifer.Bracken@kingstonhsc.ca | | |

DELETE USER

If a user needs to be completely deleted use this option. Also ensure that the question, "Is the employee leaving the hospital?" has been answered.

| | |
|---|------------|
| Is the employee leaving hospital ? | YES |
|---|------------|

Ensure all the E-Req USER NAME INFORMATION is complete.

| E-Req USER NAME INFORMATION: | | | | | | |
|---|------------------|--------------|-----------|----------------------------------|---------------------------------|--|
| **Skip User Name section, if adding/changing or deleting a unloading point only | | | | | | |
| First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address | |
| JENNIFER | BRACKEN-LAFOREST | 613-549-6666 | X4109 | Kingston General Hospital (KG01) | Jennifer.Bracken@kingstonhsc.ca | |

Additional notes are helpful for clarity.

| Additional Notes: |
|-----------------------------|
| Jennifer has retired |

- APPROVER DATA ONLY** (not necessary for Requisitioner only)

ADD APPROVER = New approver set up.

Please select Approver from the drop down.

| | | |
|----|-------------------------------------|----------|
| 14 | Please select one of the following: | APPROVER |
|----|-------------------------------------|----------|

Fill in E-Req USER NAME INFORMATION

| | | | | | | |
|----|---|-----------|--------------|-----------|----------------------------------|--|
| 18 | E-Req USER NAME INFORMATION: | | | | | |
| 19 | **Skip User Name section, if adding/changing or deleting a unloading point only | | | | | |
| 20 | First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address |
| 21 | Silvie | Crawford | 613-549-6666 | X1234 | Kingston General Hospital (KG01) | Silvie.Crawford@kingstonhsc.ca |

Then go to APPROVER DATA ONLY and select ADD APPROVER

| | | | | | | |
|----|---------------------------|-------------|----------------|-----------------------------|--------------------------|---------------------|
| 40 | | | | If New Approver leave blank | | |
| 41 | APPROVER DATA ONLY | | | | | |
| 42 | ACTION | Cost Center | Approval Limit | Approver User ID | Name of Current Approver | Current Approver ID |
| 43 | ADD APPROVER | | 500,000.00 | | | |

Enter Approver Limit. If unsure of limit(s) follow up with your Supply Chain Supervisor/Supply Chain Manager.

CHANGE APPROVER DATA

Update approver data. Last name changes and e-mail address changes can be updated on line 18. Make note in additional notes box, ie change to last name, change to e-mail etc.

| | | | | | | | |
|----|---|-----------|--------------|-----------|----------------------------------|--|--------------------------|
| 18 | E-Req USER NAME INFORMATION: | | | | | | Additional Notes: |
| 19 | **Skip User Name section, if adding/changing or deleting a unloading point only | | | | | | Update e-mail |
| 20 | First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address | |
| 21 | Silvie | Crawford | 613-549-6666 | X1234 | Kingston General Hospital (KG01) | Silvie.Crawford@kingstonhsc.com | |

Then go to APPROVER DATA ONLY and select CHANGE APPROVER DATA. Fill in Approver's User ID and new Approver Limit if this is to change.

| | | | | | | |
|--|---------------------------|-------------|----------------|-----------------------------|--------------------------|---------------------|
| | | | | If New Approver leave blank | | |
| | APPROVER DATA ONLY | | | | | |
| | ACTION | Cost Center | Approval Limit | Approver User ID | Name of Current Approver | Current Approver ID |
| | CHANGE APPROVER DATA | | 450,000.00 | CRAWFOS3 | | |

DELETE APPROVER

If an approver needs to be completely deleted use this option. Also ensure that the question, "Is the employee leaving the hospital?" has been answered.

| | |
|------------------------------------|-----|
| Is the employee leaving hospital ? | YES |
|------------------------------------|-----|

Ensure all the E-Req USER NAME INFORMATION is complete.

| E-Req USER NAME INFORMATION: | | | | | | |
|---|-----------|--------------|-----------|----------------------------------|---------------|--|
| **Skip User Name section, if adding/changing or deleting a unloading point only | | | | | | |
| First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address | |
| Silvie | Crawford | 613-549-6666 | X1234 | Kingston General Hospital (KG01) | nhsc.ca | |

Additional notes are helpful here as well.

| |
|---|
| Additional Notes: |
| Silvie is leaving hospital for new opportunity. |

Enter APPROVER DATA ONLY

| APPROVER DATA ONLY | | | | If New Approver leave blank | | |
|--------------------|-------------|----------------|------------------|-----------------------------|---------------------|--|
| ACTION | Cost Center | Approval Limit | Approver User ID | Name of Current Approver | Current Approver ID | |
| DELETE APPROVER | | | CRAWFOS3 | | | |

Enter user ID

REPLACE CURRENT COST CENTER APPROVER= A new approver is replacing current approver for a cost center. **NOTE: If the approver that is being replaced needs to be deleted from EREQ, a separate CARF is required.**

| 17 | First Name | Last Name | Phone # | Extension | Site/Plant Code | EMAIL Address |
|----|------------|-----------------|--------------|-----------|----------------------------------|--------------------------------------|
| 18 | Joyce | deVette-McPhail | 613-549-6666 | X 1234 | Kingston General Hospital (KG01) | Joyce.deVette-McPhail@kingstonhsc.ca |

Enter APPROVER DATA ONLY

| APPROVER DATA ONLY | | | | If New Approver leave blank | | |
|--------------------------------------|-------------|----------------|------------------|-----------------------------|---------------------|--|
| ACTION | Cost Center | Approval Limit | Approver User ID | Name of Current Approver | Current Approver ID | |
| REPLACE CURRENT COST CENTER APPROVER | AUDH | 100,000.00 | DEVETTEJ | Paula Varette-Cerre | VARETTEP | |

Enter Approver Data

Example - Cost center AUDH currently approved by VARETTEP will now be approved by DEVETTEJ

Existing EREQ Approvers can be identified by the username only, if verified using SQ01 Query – EREQUSERS by cost center, as shown above.

Approver limits can be found using SQ01 Query EREQAPPROVERS, as shown above

APPENDIX A – BUILDING ABBREVIATIONS

| SITE | Building | Abbreviation |
|-------------|-----------------------------|---------------------|
| BG01 | CHARLES STREET SITE | CSS |
| BG02 | GARDEN STREET SITE | GSS |
| HD01 | CENTENARY | CENT |
| | JEAN MANCE | JM |
| | MURRAY | MURR |
| | BROCK | BROCK |
| | JOHNSON | JOHN |
| | MARY ALICE | MA |
| KG01 | ARMSTRONG | ARM |
| | BURR | BURR |
| | CENTENARY | CENT |
| | CONNELL | CONN |
| | DAVIES | DAVI |
| | DIETARY | DIET |
| | DOUGLAS | DOUG |
| | KIDD | KIDD |
| | VICTORY | VIC |
| | WATKINS | WATK |
| | BARRIE | BARR |
| | ETHERINGTON HALL | ETHE |
| LA01 | LENNOX AND ADDINGTON | LACGH |
| PM01 | BAY STREET | BAY |
| | MONTREAL | MNTL |
| | SYDENHAM | SYD |
| SML1 | DOWNTOWN | DT |
| | HERITAGE | HE |
| | LAKEVIEW | LV |
| | PARKSIDE | PS |
| PE01 | PERTH - GREAT WAR ME-MORIAL | GWM |
| SF01 | SMITH FALLS | SF |
| BL01 | QUINTE - BELLEVILLE | QUINTE |
| | SILLS - BELLEVILLE | SILLS |
| | WCA- BELLEVILLE | WCA |
| NH01 | NORTH HASTINGS | NH |
| PEC1 | PICTON | PECMH |
| TM01 | TRENTON | TMH |

Assign building # in front, ie 24
BARR