

OFFICE OF THE PRESIDENT AND CHIEF EXECUTIVE OFFICER

EXTERNAL SERVICES

Volume 1

OFFICE OF THE PRESIDENT AND CHIEF EXECUTIVE OFFICER
CORPORATE PLANNING DEPARTMENT
OFFICE OF THE CORPORATE SECRETARY
SECRETARIAT FOR BIDS AND AWARDS COMMITTEE

LIST OF SERVICES

EXTERNAL SERVICES

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OFFICE OF THE PRESIDENT AND CHIEF EXECUTIVE OFFICER

1. MANAGEMENT OF DOCUMENTS

This covers the receipt of incoming documents from Internal and External Clients

Office/Division	Office of the President and CEO			
Classification	Simple			
Type of Transaction	G2G- Government to Government, G2C- Government to Citizens			
Who may avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Cover Letter or Memo of Request				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE (Position of Supervisor)
1. Admin staff/Messenger of other Government or Private Entities Offices submits letters or documents.	1.1 Check the nature of the document and completeness	None	3 minutes	Receiving Officer, Office of the President
	1.2 Stamp received on the transmittal page and return to the admin staff	None	2 minutes	Receiving Officer, Office of the President
	1.3 Encode in the documents tracking	None	5 minutes	Receiving Officer, Office of the President
	1.4 Assign reference number, segregate, print routing slip and forward for scanning	None	5 minutes	Receiving Officer, Office of the President
	1.5 Scan documents and forwards to concerned OP Staff for review	None	15 minutes	Receiving Officer/Admin Staff, Office of the President
	TOTAL	None	30 minutes	

2. CORPORATE LEGAL SERVICES

Review of documents prior to approval of the President and CEO (Legal Documents, MOA and Contracts)

Office/Division	Office of the Corporate Legal Counsel			
Classification	HIGHLY TECHNICAL			
Type of Transaction	G2G- Government to Government			
Who may avail:	Office of the President and CEO			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE (Position of Supervisor)
Admin Staff of Office of the President and CEO endorses the Legal Documents, MOA and Contracts to the Office of the Corporate Legal Counsel Receiving Staff	1.1. Receives the document and stamps received on the transmittal file copy and return to Admin Staff of Office of the President	None	5 minutes	Admin staff of Office of the Corporate Legal Counsel
	1.2 Legal document is encoded in the document tracking and scanned		5 minutes	Admin staff of Office of the Corporate Legal Counsel
	1.3 Prints out Routing Slip and refers the documents to Technical Executive Assistant for evaluation and review		5 minutes	Admin/Receiving Staff of Office of the Corporate Legal Counsel
	1.4. Technical Executive Assistant evaluates and reviews the legal documents and prepares the draft letter or memo reply, comment or instruction to be referred to		3 days (depending on complexing of Legal Document, MOA and Contracts)	Technical Executive Assistant, Office of the Corporate Legal Counsel

	Corporate Legal Counsel for final evaluation, review and signature			
	1.5. Technical Executive Assistant endorses the draft reply, comment or instruction together with the Legal documents to the Corporate Legal Counsel		1 hour	Technical Executive Assistant, Office of the Corporate Legal Counsel
	1.6. Corporate Legal Counsel reviews submitted draft reply, comment or instruction prepared by the Technical Executive Assistant on the Legal Documents		6 days (depending on complexing of Legal Document, MOA and Contracts)	Corporate Legal Counsel, Office of the Corporate Legal Counsel
	1.7 Once approved, Corporate Legal Counsel recommends and signs the legal documents to be endorsed to the Office of the President and CEO.		1 day	Corporate Legal Counsel, Office of the Corporate Legal Counsel
	1.8 Admin Staff shall record the recommendation in the document tracking and scan the file before routing back to Office of the President		15 minutes	Admin staff of Office of the Corporate Legal Counsel
	TOTAL	None	10 days, 1 hour and 30 minutes	

3. REVIEW OF DOCUMENTS – SIMPLE

This covers the transmitting and review of incoming documents from Internal and External Clients

Office/Division	Office of the President and CEO			
Classification	Simple			
Type of Transaction	G2G- Government to Government, G2C- Government to Citizens			
Who may avail:	All			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
Cover Letter or Memo of Request				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE (Position of Supervisor)
1. OP Staff receives document from Admin Staff		None	5 minutes	Admin staff, Executive Assistant, Office of the President
	1.1. OP Staff evaluates the completeness of the document and its attachments	None	1 hour	Executive Assistant, Office of the President
	1.2 If incomplete, OP Staff endorses the document back to the originating unit with instruction in the internal routing slip for completion	None	1 hour	Executive Assistant, Office of the President
	1.2.a Admin Staff records in document tracking and scans the document to be routed back to originating unit/ office	None	1 hour	Admin/receiving staff, Office of the President
	1.3 If complete, endorsed to Head Executive Assistant or concerned unit or office for appropriate action	None	1 hour	Head Executive Assistant, Office of the President/Unit or Office Concerned
	TOTAL	None	4 hours and 5 minutes	

4. REVIEW OF DOCUMENTS – COMPLEX

This covers the transmitting and review of incoming documents from Internal and External Clients

Office/Division	Office of the President and CEO			
Classification	Complex			
Type of Transaction	G2G- Government to Government, G2C- Government to Citizens			
Who may avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Cover Letter or Memo of Request				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE (Position of Supervisor)
	1. OP Staff receives document from admin staff	None	5 minutes	Admin staff, Executive Assistant, Office of the President
	2. OP Staff evaluates the completeness of the document and its attachments		6 days (depending on complexity of request)	Executive Assistant, Office of the President
	3. If complete, endorse to HEad Executive Assistant or concerned unit or office for appropriate action		1 hour	Head Executive Assistant, Office of the President/Unit or Office Concerned
	3.1. Admin Staff records in document trackin and scans the document to be routed back to originatiing unit/office.		1hour	Admin/receiving staff, Office of the President
	TOTAL	None	6 days 1 hour and 5 minutes	

CORPORATE PLANNING DEPARTMENT

1. ISSUANCE OF CORPORATE PERFORMANCE AND GCG COMMITMENT REPORTS

The Corporate Planning Department - Performance Management Unit performs monitoring of Corporate Performance and GCG Commitments at least once every quarter to update the management on the status of the Corporate commitments, keep track on the Corporate thrusts and identify how to possibly address challenges that hamper the achievement of each success measure/targets. This activity mainly provides quarterly report of Corporate performance and GCG commitments with vetted reports from the concerned offices for presentation to the Executive Committee. Individual reports per success measure and other corporate performance -related reports are also being safekeep by the unit. As part of the "new normal" and as PMU exercises environmental responsibility, the unit issues documents in a secure electronic format via e-mail. It will not provide printed documents unless extremely necessary.

and e-mail. It will not provide printed documents unless extremely necessary.

Office:	Corporate Planning Department - Performance Management Unit (PMU)			
Classification:	Highly Technical			
Type of Transaction:	G2G - Government to Government Agency			
Who May Avail:	GCG and Government agencies requesting the Corporate Scorecard			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
1. Official Request Letter endorsed by the concerned office (1 Electronic copy) requiring the following information:			Requesting Government Agency/ Organization/ Individual	
1.1 Full name with Signature of the Person requesting the data/report				
1.2 Purpose				
1.3 Specific data/report being Requested				
1.4 Contact number and email address of the requesting party				
1.5 Target date the data/report is expected to receive (as necessary)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Submit the request to the Office of the Senior Manager of the Corporate Planning Department via email at corplan.uhc@gmail.com	1. Administrative staff in the Office of the Manager to receive the request and encode in the department database of received documents.	None	1 Day	Administrative staff (CorPlan Office of the Senior Manager)

2. Receive an acknowledgement receipt of the request	2.1 Administrative staff in the Office of the Manager to acknowledge receipt of the request and send acknowledgment email to the requesting party.	None		Administrative staff (CorPlan Office of the Senior Manager)
None	2.2 Administrative staff in the Office of the Manager to forward the request to the Performance Management Unit (PMU) via email at corplanperformance@gmail.com.	None		Administrative staff (CorPlan Office of the Senior Manager)
None	2.3 PMU staff to review data/report request if already available in the PMU files or for request to concerned office.	None	5 Days	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)
None	2.4 PMU staff to consolidate data/reports being requested on hand OR to coordinate with concerned office if data is not yet on hand.	None	8 Days	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)
None	2.5 PMU staff to consult with the CorPlan Senior Manager on consolidated data/reports according to the request format for approval to release	None	5 Days	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)
3. Receive an e-mail reply from PMU re: the requested data/report	3. PMU staff to send an e-mail reply to the requesting party providing the data requested (if available) or notification on unavailability of data/report	None	1 Day	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)
	TOTAL:	None	20 days	

2. PROCESSING OF INFORMATION/DATA REQUESTS (COMPLEX)

This process covers handling of external requests for records and data within the Corporation and ensure that all records/data releases by the Corporation shall be in compliance with the mandates of the Universal Health Care Act of 2019 (RA 11223), Ease of Doing Business and Efficient Government Service Delivery Act of 2018 (RA 11032), Freedom of Information Order (EO No. 2 s.2016), Data Privacy Act of 2012 (RA10173), and the Department of Budget Management (DBM and Governance Commission for GOCCs' (GCG) Good Governance Requirements (e.g. Transparency Seal).

Office:	Corporate Planning Department - Knowledge Resource Unit			
Classification:	Complex			
Type of Transaction:	G2G - Government to Government; G2C - Government to Citizen; G2B - Government to Business			
Who May Avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Formal Letter containing the following:		Corporate Planning Department - Knowledge Resource Unit		
1. Date				
2. Full Name				
3. Office (if applicable; institution)				
4. Description of Data Being Requested				
5. Purpose of Request (e.g. use for data, etc.)				
6. Reference Period of Data Being Requested				
7. Data Needed				
8. Format (e.g. table format, print-out, digital, etc.)				
9. Other information that could help the concerned office that shall process the data (e.g. script parameters, etc.)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit letter request (hard copy or thru email) to the CorPlan	Receive letter from requesting party and forward to Knowledge Management Unit	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)

Receive acknowledgement receipt from this office	Send acknowledgement receipt to requesting party	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
	Validate letter as to completeness of necessary details in order to properly process the request	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If incomplete (e.g. unclear instructions, with questions for verification, etc.), inform or clarify details with the requesting party.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Validate if the requested information is available in PhilHealth website, if so, the requesting party will be informed and the link will be provided.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If the requested information is not in the custody of the Corporation and any of its offices, if so, the requesting party shall be advised accordingly	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If the requested information is the same as a previous request which was already granted or denied, if so, proper information shall be provided to the requesting party to this effect.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Review and classify the request per internal guidelines (e.g. restricted, confidential, with Personally-Identifiable Information/PII, etc.)	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Identify the source of the requested information (e.g. Sharepoint/PhilHealth Corporate Dashboard (PCD), Database)			
	Locate, retrieve, and/or extract the required information			
	Properly document, record, and monitor the request, including turn-around-time			

	If with Data Privacy Concerns, endorse the request to the Data Protection Officer (DPO) for evaluation.			
	If without any Data Privacy concerns, endorse the request to concerned offices (e.g. Task Force Informatics)			
	Concerned office (e.g. Task Force Informatics, Sectors concerned) provides/extracts the data requested	None	5 Days	Data Analyst (Task Force Informatics/Office concerned)
	Provide proper information to requesting party if the request for data/information will require extension. These reasons may include but not limited to examination of voluminous records, the occurrence of fortuitous events, coincides with voluminous requests, or other analogous cases	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Should this be the case, provide proper information to requesting party of the extension, explaining the reasons for such, for fifteen (15) working days, but not exceed twenty (20) working days unless in exceptional circumstances warranting a longer period	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Upon receipt of data from processing / extracting office (e.g. Task Force Informatics, Sectors concerned, etc.), this office further formats the data to the specifications of the requesting party (e.g. table formats, etc.)	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Determine applicable fees based on internal pricing guidelines, if any:	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	(For Government agencies, Policy-makers, Local government / sponsoring institutions, prospective			***

	PhilHealth Project / Program Donors/Sponsors and as directed by judicial courts)			
	Readily available data published in the corporate websites (e.g. philhealth.gov.ph, Knowledge Management Portal) for public or external use shall be free of charge.	None		Planning Officer (Knowledge Resource Unit)
	For data that need to be customized in a manner or format that is not readily available, the Corporation shall charge a fee covering minimal charges	Labor Cost (e.g. man-hours): Php75.00 per hour; Computer Time and Operating Costs: Php10.00 per hour; and Printing / Duplication / Reproduction Costs: Php2.00 per page		Planning Officer (Knowledge Resource Unit)
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	Php0.0375 per kilobyte plus the cost of CDs or USB drives to be used		Planning Officer (Knowledge Resource Unit)
	(For Research Organizations / Researchers / Students and Agencies with Jurisdiction over institutions and individuals)			***
	Published and readily available data/tables for public or external use shall be charged	Minimum Processing Fee (for 1-page document print):		Planning Officer (Knowledge Resource Unit)

		Php25.00; Additional cost per table / page document print: Php5.00		
	For data need to be customized in a manner or format that is not readily available, the Corporation shall charge a fee covering minimal incidental charges	Labor Cost (per number of man-hours worked): Php 150.00 per hour; Computer Time and Operating Costs: Php 20.00 per hour; Printing / Duplication / Reproduction costs: Php 5.00 per page		Planning Officer (Knowledge Resource Unit)
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	Php 0.075 per kilobyte plus the cost of CDs or USB drives to be used to be used.		Planning Officer (Knowledge Resource Unit)
	(Urgent requests will be entertained but shall be subject to higher rate)	(Rate: 10% more than the computed cost of the data request)		Planning Officer (Knowledge Resource Unit)
	(Grant or Deny of the Request for Information)	None	1 Hour	***

	If denied: Write a response letter to the requesting party informing them of the denial of the request. The letter should indicate the grounds for denial and the circumstances on which the denial was based on. Route for appropriate approval If no notice was provided within fifteen (15) working days since the submission of the request, this would indicate that the request was denied	None		Planning Officer (Knowledge Resource Unit)
Receives letter/billing from this office of total amount to be paid (if any)	If granted: Inform or notify the requesting party; including the amount of applicable fees, if any. This should comply with internal rules and procedures on payment of applicable fees	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Requesting party pays the determined amount with the Corporation's Cashier office	Processes the payment	None	1 Hour	Cashier Staff (Cashier office)
Receives official receipt from Cashier	Provides official receipt to requesting party	None		Cashier Staff (Cashier office)
Requesting party presents copy of official receipt to this office as proof of payment	Receives copy of the official receipt as confirmation	None	1 Hour	Planning Officer (Knowledge Resource Unit)

Requesting party receives the data requested.	Sends the requested data	None		Planning Officer (Knowledge Resource Unit)
	TOTAL:	(as applicable)	7 Days	

3. PROCESSING OF DOCUMENT OR DATA REQUESTS IN AID OF LEGISLATION

Office:	Corporate Planning Department - Legislative Unit			
Classification:	Highly Technical			
Type of Transaction:	G2G - Government to Government			
Who May Avail:	Legislative Liaison Officers of other Government Agencies, Senate of the Philippines, House of Representatives			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
1. Letter from the requesting party (hard copy or via e-mail) 1.1. endorsed by the Office of the President and CEO 1.2. request from concerned party		Concerned government office/ department/ agency		
2. Letter containing a brief description and purpose of request		Concerned government office/ department/ agency		
3. Clearance form DPO or CorSec, as needed		Office of the Data Privacy Officer or Office of the Corporate Secretary		
4. Document or Data from concerned PhilHealth offices		Concerned PhilHealth office		
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Letter request from the requesting party addressed to the Office of the President of PhilHealth stating action required and brief background on the request 1.1. endorsed by the President and CEO 1.2. request from concerned party	1.1. Acknowledge receipt of documents as endorsed by the office of the President and CEO 1.2. Acknowledge receipt of request from concerned party (through email or hard copy)	none	1 hour	Administrative Staff / Legislative Liaison Officer

2. Requesting party waits for the result of request	2. Evaluate the request and classify per internal guidelines	none	2 hours	Planning Officer (Legislative Unit)
	2.1. Validate needed document or data with the requesting party, if necessary	none	2 hours	Planning Officer (Legislative Unit)
	2.2. Seek clearance with the Office of the Data Privacy Officer (DPO) or Corporate Secretary (CorSec), if necessary depending on the document/data/information being requested	none	1 day	Planning Officer (Legislative Unit or Knowledge Management Unit of the Corporate Planning Department)
	2.2.1. If the DPO or CorSec approves the request, the needed information will be processed	none		
	2.2.2. If the DPO or CorSec denies the release of requested information, a letter of regrets shall be drafted	none		
	2.3. Request document or data to concerned offices	none	1 day	Planning Officer (Legislative Unit)
	2.4. Concerned offices submits document or data being requested (submission of documents or data may differ depending on the volume, availability, and complexity of the needed information)	none	10 days	Concerned Offices (e.g., MMG, HFPS, Legal, Actuary, etc.)
	2.5. Document and monitor request	none	1 hour	Planning Officer (Legislative Unit)
	2.6. Acknowledge receipt of documents/data from concerned offices	none	1 hour	Planning Officer (Legislative Unit)
	2.7. Review and assess submitted documents/data by concerned offices for completeness	none	2 hours	Planning Officer (Legislative Unit)

	2.8. Draft letter response to requesting party approved by the President and CEO	none	4 hours	Planning Officer (Legislative Unit)
	2.9. Review of letter response and ensure completeness of requested document or data	none	1 day	Planning Officer (Legislative Unit), Division Chief, Senior Manager (Corporate Planning Department)
	2.10. Route letter response attaching all pertinent documents for approval	none	1 hour	Administrative Staff
	2.11. Approval of letter response and by concerned offices	none	5 days	Concerned offices / Members of the Committee on Legislation
	2.11. Receive and document approved letter response	none	1 hour	Administrative Staff
3. Requesting party receives the requested document	3. Send requested document or data	none	1 hour	Legislative Liaison Officer
	TOTAL:	None	20 days	

4. PROCESSING OF FREEDOM OF INFORMATION (FOI) DATA REQUESTS (THROUGH EFOI PORTAL)

This process covers handling of external requests for records and data within the Corporation and ensure that all records/data releases by the Corporation shall be in compliance with the mandates of the Universal Health Care Act of 2019 (RA 11223), Ease of Doing Business and Efficient Government Service Delivery Act of 2018 (RA 11032), Freedom of Information Order (EO No. 2 s.2016), Data Privacy Act of 2012 (RA10173), and the Department of Budget Management (DBM and Governance Commission for GOCCs' (GCG) Good Governance Requirements (e.g. Transparency Seal).

Office:	Corporate Action Center (CAC) / Corporate Planning Department - Knowledge Resource Unit			
Classification:	Requests through eFOI Portal			
Type of Transaction:	G2G - Government to Government; G2C - Government to Citizen; G2B - Government to Business			
Who May Avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Formal Letter containing the following:		Freedom of Information Website: https://www.foi.gov.ph/requests?agency=PH		
1. Date				
2. Full Name				
3. Office (if applicable; institution)				
4. Description of Data Being Requested				
5. Purpose of Request (e.g. use for data, etc.)				
6. Reference Period of Data Being Requested				
7. Data Needed				
8. Format (e.g. table format, print-out, digital, etc.)				
9. Other information that could help the concerned office that shall process the data (e.g. script parameters, etc.)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit data request via eFOI Portal	Receive data request from requesting party via eFOI Portal	None	0	Corporate Action Center (CAC) Designate FOI Receiving Officer
	Receive data request from Corporate Action Center (CAC)	None	4 Hours	

	Validate request as to the completeness of parameters data being requested	None		
Provide necessary informations	If with clarifications, return request to the requesting party (i.e. data parameters, variables, etc.)	None		
	Checking if the requested information is available in PhilHealth website, if so, the requesting party will be informed and the link will be provided.	None		
Receive letter/email from this office	If the requested information is not in the custody of the Corporation and any of its offices, if so, the requesting party shall be advised accordingly	None		FOI Decision Maker/Planning Officer
Receive letter/email from this office	Receive data request from requesting party via eFOI Portal	None		FOI Decision Maker/Planning Officer
	Review and classify the request per internal guidelines (e.g. restricted, confidential, with Personally-Identifiable Information/PII, etc.)			
	Identify the source of the requested information (e.g. Sharepoint/PhilHealth Corporate Dashboard (PCD), Database)			
	Locate, retrieve, and/or extract the required information			
	Properly document, record, and monitor the request, including turn-around-time			
	If with Data Privacy Concerns, endorse the request to the Data Protection Officer (DPO) for evaluation.			
	If without any Data Privacy concerns, endorse the request to concerned offices (e.g. Task Force Informatics)	None	4 Hours	"Planning Officer (Knowledge Resource Unit)"
	Concerned office (e.g. Task Force Informatics, Sectors concerned) provides/extracts the data requested	None	13 Days	Data Analyst (Task Force Informatics/Office concerned)

	Provide proper information to requesting party if the request for data/information will require extension. These reasons may include but not limited to examination of voluminous records, the occurrence of fortuitous events, coincides with voluminous requests, or other analogous cases	None		Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Should this be the case, provide proper information to requesting party of the extension, explaining the reasons for such, for fifteen (15) working days, but not exceed twenty (20) working days unless in exceptional circumstances warranting a longer period	None		Planning Officer (Knowledge Resource Unit)
	Upon receipt of data from processing / extracting office (e.g. Task Force Informatics, Sectors concerned, etc.), this office further formats the data to the specifications of the requesting party (e.g. table formats, etc.)	None		Planning Officer (Knowledge Resource Unit)
	Determine applicable fees based on internal pricing guidelines, if any:	None		Planning Officer (Knowledge Resource Unit)
	(For Government agencies, Policy-makers, Local government / sponsoring institutions, prospective PhilHealth Project / Program Donors/Sponsors and as directed by judicial courts)			***
	Readily available data published in the corporate websites (e.g. philhealth.gov.ph, Knowledge Management Portal) for public or external use shall be free of charge.	None		Planning Officer (Knowledge Resource Unit)
	For data that need to be customized in a manner or format that is not readily available, the Corporation shall charge a fee covering minimal charges	"Labor Cost (e.g. man-hours): Php75.00 per hour; Computer Time and Operating	4 Hours	"Planning Officer (Knowledge Resource Unit)"

		Costs: Php10.00 per hour; and Printing / Duplication / Reproduction Costs: Php2.00 per page"		
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	"Php0.0375 per kilobyte plus the cost of CDs or USB drives to be used"		Planning Officer (Knowledge Resource Unit)
	(For Research Organizations / Researchers / Students and Agencies with Jurisdiction over institutions and individuals)			***
	Published and readily available data/tables for public or external use shall be charged	"Minimum Processing Fee (for 1-page document print): Php25.00; Additional cost per table / page document print: Php5.00"		Planning Officer (Knowledge Resource Unit)
		"Labor Cost (per number of man-hours worked): Php 150.00 per hour; Computer Time and Operating		Planning Officer (Knowledge Resource Unit)

		Costs: Php 20.00 per hour; Printing / Duplication / Reproduction costs: Php 5.00 per page"		
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	"Php 0.075 per kilobyte plus the cost of CDs or USB drives to be used to be used."		Planning Officer (Knowledge Resource Unit)
	(Urgent requests will be entertained but shall be subject to higher rate)	(Rate: 10% more than the computed cost of the data request		Planning Officer (Knowledge Resource Unit)
	(Grant or Deny of the Request for Information)	None		***
	If denied: Write a response letter to the requesting party informing them of the denial of the request. The letter should indicate the grounds for denial and the circumstances on which the denial was based on. Route for appropriate approval If no notice was provided within fifteen (15) working days since the submission of the request, this would indicate that the request was denied	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receives letter/billing from this office of	If granted: Inform or notify the requesting party; including the amount of applicable fees, if any. This should comply with internal rules and procedures on payment of applicable fees	None	1 Hour	Planning Officer (Knowledge Resource Unit)

total amount to be paid (if any)				
Requesting party pays the determined amount with the Corporation's Cashier office	Processes the payment	None	1 Hour	Cashier Staff (Cashier office)
Receives official receipt from Cashier	Provides official receipt to requesting party	None		Cashier Staff (Cashier office)
Requesting party presents copy of official receipt to this office as proof of payment	Receives copy of the official receipt as confirmation	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Requesting party receives the data requested.	Sends the requested data	None		Planning Officer (Knowledge Resource Unit)
	TOTAL:	(as applicable)	15 Days	

5. PROCESSING OF INFORMATION/DATA REQUESTS (HIGHLY TECHNICAL)

Description of the Service: This process covers handling of external requests for records and data within the Corporation and ensure that all records/data releases by the Corporation shall be in compliance with the mandates of the Universal Health Care Act of 2019 (RA 11223), Ease of Doing Business and Efficient Government Service Delivery Act of 2018 (RA 11032), Freedom of Information Order (EO No. 2 s.2016), Data Privacy Act of 2012 (RA10173), and the Department of Budget Management (DBM and Governance Commission for GOCCs' (GCG) Good Governance Requirements (e.g. Transparency Seal).

Office:	Corporate Planning Department - Knowledge Resource Unit			
Classification:	Highly Technical			
Type of Transaction:	G2G - Government to Government; G2C - Government to Citizen; G2B - Government to Business			
Who May Avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Formal Letter containing the following:		Corporate Planning Department - Knowledge Resource Unit		
1. Date				
2. Full Name				
3. Office (if applicable; institution)				
4. Description of Data Being Requested				
5. Purpose of Request (e.g. use for data, etc.)				
6. Reference Period of Data Being Requested				
7. Data Needed				
8. Format (e.g. table format, print-out, digital, etc.)				
9. Other information that could help the concerned office that shall process the data (e.g. script parameters, etc.)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit letter request (hard copy or thru email) to the CorPlan	Receive letter from requesting party and forward to Knowledge Management Unit	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)

Receive acknowledgement receipt from this office	Send acknowledgement receipt to requesting party	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
	Validate letter as to completeness of necessary details in order to properly process the request	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If incomplete (e.g. unclear instructions, with questions for verification, etc.), inform or clarify details with the requesting party.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Validate if the requested information is available in PhilHealth website, if so, the requesting party will be informed and the link will be provided.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If the requested information is not in the custody of the Corporation and any of its offices, if so, the requesting party shall be advised accordingly	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If the requested information is the same as a previous request which was already granted or denied, if so, proper information shall be provided to the requesting party to this effect.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Review and classify the request per internal guidelines (e.g. restricted, confidential, with Personally-Identifiable Information/PII, etc.)	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Identify the source of the requested information (e.g. Sharepoint/PhilHealth Corporate Dashboard (PCD), Database)			
	Locate, retrieve, and/or extract the required information			
	Properly document, record, and monitor the request, including turn-around-time			

	If with Data Privacy Concerns, endorse the request to the Data Protection Officer (DPO) for evaluation.			
	If without any Data Privacy concerns, endorse the request to concerned offices (e.g. Task Force Informatics)			
	Concerned office (e.g. Task Force Informatics, Sectors concerned) provides/extracts the data requested	None	18 Days	Data Analyst (Task Force Informatics/Office concerned)
	Provide proper information to requesting party if the request for data/information will require extension. These reasons may include but not limited to examination of voluminous records, the occurrence of fortuitous events, coincides with voluminous requests, or other analogous cases	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Should this be the case, provide proper information to requesting party of the extension, explaining the reasons for such, for fifteen (15) working days, but not exceed twenty (20) working days unless in exceptional circumstances warranting a longer period	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Upon receipt of data from processing / extracting office (e.g. Task Force Informatics, Sectors concerned, etc.), this office further formats the data to the specifications of the requesting party (e.g. table formats, etc.)	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Determine applicable fees based on internal pricing guidelines, if any:	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	(For Government agencies, Policy-makers, Local government / sponsoring institutions, prospective			***

	PhilHealth Project / Program Donors/Sponsors and as directed by judicial courts)			
	Readily available data published in the corporate websites (e.g. philhealth.gov.ph, Knowledge Management Portal) for public or external use shall be free of charge.	None		Planning Officer (Knowledge Resource Unit)
	For data that need to be customized in a manner or format that is not readily available, the Corporation shall charge a fee covering minimal charges	Labor Cost (e.g. man-hours): Php75.00 per hour; Computer Time and Operating Costs: Php10.00 per hour; and Printing / Duplication / Reproduction Costs: Php2.00 per page		Planning Officer (Knowledge Resource Unit)
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	Php0.0375 per kilobyte plus the cost of CDs or USB drives to be used		Planning Officer (Knowledge Resource Unit)
	(For Research Organizations / Researchers / Students and Agencies with Jurisdiction over institutions and individuals)			***
	Published and readily available data/tables for public or external use shall be charged	Minimum Processing Fee (for 1-page document print):		Planning Officer (Knowledge Resource Unit)

		Php25.00; Additional cost per table / page document print: Php5.00		
		Labor Cost (per number of man-hours worked): Php 150.00 per hour; Computer Time and Operating Costs: Php 20.00 per hour; Printing / Duplication / Reproduction costs: Php 5.00 per page		Planning Officer (Knowledge Resource Unit)
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	Php 0.075 per kilobyte plus the cost of CDs or USB drives to be used to be used.		Planning Officer (Knowledge Resource Unit)
	(Urgent requests will be entertained but shall be subject to higher rate)	(Rate: 10% more than the computed cost of the data request)		Planning Officer (Knowledge Resource Unit)
	(Grant or Deny of the Request for Information)	None	1 Hour	***

	If denied: Write a response letter to the requesting party informing them of the denial of the request. The letter should indicate the grounds for denial and the circumstances on which the denial was based on. Route for appropriate approval If no notice was provided within fifteen (15) working days since the submission of the request, this would indicate that the request was denied	None		Planning Officer (Knowledge Resource Unit)
Receives letter/billing from this office of total amount to be paid (if any)	If granted: Inform or notify the requesting party; including the amount of applicable fees, if any. This should comply with internal rules and procedures on payment of applicable fees	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Requesting party pays the determined amount with the Corporation's Cashier office	Processes the payment	None	1 Hour	Cashier Staff (Cashier office)
Receives official receipt from Cashier	Provides official receipt to requesting party	None		Cashier Staff (Cashier office)
Requesting party presents copy of official receipt to this office as proof of payment	Receives copy of the official receipt as confirmation	None	1 Hour	Planning Officer (Knowledge Resource Unit)

Requesting party receives the data requested.	Sends the requested data	None		Planning Officer (Knowledge Resource Unit)
	TOTAL:	(as applicable)	20 Days	

6. PROCESSING OF RESEARCH/INFORMATION REQUESTS (COMPLEX)

Description of the Service: This process covers handling of internal/external requests for research full text copy intended for individual or institution study references.

Office:	Corporate Planning Department - Research and Special Studies Unit			
Classification:	Complex			
Type of Transaction:	G2G - Government to Government; G2C - Government to Citizen; G2B - Government to Business			
Who May Avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Formal Letter containing the following:				
1. Date				
2. Full Name				
3. Office (if applicable; institution)				
4. Description of Research Being Requested				
5. Purpose of Request (Student, Academic, etc.)				
6. Type of Request (PhilHealth STUDIES, Capstone, etc.)				
7. Particulars (Title of Study, Project Leader, etc.)				
8. Other information (Designation, signature, etc.)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit letter request (hard copy or thru email) to the CorPlan	Receive letter from requesting party and forward to Knowledge Management Unit	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
Receive acknowledgement receipt from this office	Send acknowledgement receipt to requesting party	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
	Validate letter as to completeness of necessary details in order to properly process the request	None	1 Hour	Planning Officer (Knowledge Resource Unit)

Receive letter/email from this office	If incomplete (e.g. unclear instructions, with questions for verification, etc.), inform or clarify details with the requesting party.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Validate if the requested information is available in PhilHealth website, if so, the requesting party will be informed and the link will be provided.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Review and classify the request per internal guidelines (e.g. restricted, confidential, with Personally-Identifiable Information/PII, etc.)	None	3 Hours	Planning Officer (Research Unit)
	Locate, retrieve, and/or extract the required information			
	Properly document, record, and monitor the request, including turn-around-time			
	If with Data Privacy Concerns, endorse the request to the Data Protection Officer (DPO) for evaluation.			
	If without any Data Privacy concerns, proceed with the processing of request			
	Concerned office (e.g. Legal, Sectors concerned) reviews and provides approval of research copy as requested	None	5 Days	DPO or Sector concerned
	Provide proper information to requesting party if the requested study/information will require extension. These reasons may include clearance from proponent offices	None	1 Hour	Planning Officer (Research Unit)
Receive letter/email from this office	Should this be the case, provide proper information to requesting party of the extension, explaining the reasons for such, for three (3) working days, but not exceed seven (7) working days unless in exceptional circumstances warranting a longer period	None	2 Hours	
	Upon receipt of approval, this office shall process the request (e.g. full text copy, abstract, etc.)	None	4 Hours	

Requesting party receives the data requested.	Sends the requested data	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	TOTAL:	(as applicable)	7 Days	

7. PROCESSING OF INFORMATION/DATA REQUESTS (SIMPLE)

This process covers handling of external requests for records and data within the Corporation and ensure that all records/data releases by the Corporation shall be in compliance with the mandates of the Universal Health Care Act of 2019 (RA 11223), Ease of Doing Business and Efficient Government Service Delivery Act of 2018 (RA 11032), Freedom of Information Order (EO No. 2 s.2016), Data Privacy Act of 2012 (RA10173), and the Department of Budget Management (DBM and Governance Commission for GOCCs' (GCG) Good Governance Requirements (e.g. Transparency Seal).

Office:	Corporate Planning Department - Knowledge Resource Unit			
Classification:	Simple			
Type of Transaction:	G2G - Government to Government; G2C - Government to Citizen; G2B - Government to Business			
Who May Avail:	All			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Formal Letter containing the following:		Corporate Planning Department - Knowledge Resource Unit		
1. Date				
2. Full Name				
3. Office (if applicable; institution)				
4. Description of Data Being Requested				
5. Purpose of Request (e.g. use for data, etc.)				
6. Reference Period of Data Being Requested				
7. Data Needed				
8. Format (e.g. table format, print-out, digital, etc.)				
9. Other information that could help the concerned office that shall process the data (e.g. script parameters, etc.)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit letter request (hard copy or thru email) to the CorPlan	Receive letter from requesting party and forward to Knowledge Management Unit	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)

Receive acknowledgement receipt from this office	Send acknowledgement receipt to requesting party	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
	Validate letter as to completeness of necessary details in order to properly process the request	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If incomplete (e.g. unclear instructions, with questions for verification, etc.), inform or clarify details with the requesting party.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	Validate if the requested information is available in PhilHealth website, if so, the requesting party will be informed and the link will be provided.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If the requested information is not in the custody of the Corporation and any of its offices, if so, the requesting party shall be advised accordingly	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receive letter/email from this office	If the requested information is the same as a previous request which was already granted or denied, if so, proper information shall be provided to the requesting party to this effect.	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Review and classify the request per internal guidelines (e.g. restricted, confidential, with Personally-Identifiable Information/PII, etc.)	None	1 Hour	Planning Officer (Knowledge Resource Unit)
	Identify the source of the requested information (e.g. Sharepoint/PhilHealth Corporate Dashboard (PCD), Database)			
	Locate, retrieve, and/or extract the required information			
	Properly document, record, and monitor the request, including turn-around-time			

	If with Data Privacy Concerns, endorse the request to the Data Protection Officer (DPO) for evaluation.			
	If without any Data Privacy concerns, endorse the request to concerned offices (e.g. Task Force Informatics)			
	Concerned office (e.g. Task Force Informatics, Sectors concerned) provides/extracts the data requested	None	1 Day	Data Analyst (Task Force Informatics/Office concerned)
	Provide proper information to requesting party if the request for data/information will require extension. These reasons may include but not limited to examination of voluminous records, the occurrence of fortuitous events, coincides with voluminous requests, or other analogous cases	None	1 Hour	
Receive letter/email from this office	Should this be the case, provide proper information to requesting party of the extension, explaining the reasons for such, for fifteen (15) working days, but not exceed twenty (20) working days unless in exceptional circumstances warranting a longer period	None	1 Hour	
	Upon receipt of data from processing / extracting office (e.g. Task Force Informatics, Sectors concerned, etc.), this office further formats the data to the specifications of the requesting party (e.g. table formats, etc.)	None	1 Hour	
	Determine applicable fees based on internal pricing guidelines, if any:	None	1 Hour	Planning Officer (Knowledge Resource Unit)

	(For Government agencies, Policy-makers, Local government / sponsoring institutions, prospective PhilHealth Project / Program Donors/Sponsors and as directed by judicial courts)			
	Readily available data published in the corporate websites (e.g. philhealth.gov.ph, Knowledge Management Portal) for public or external use shall be free of charge.	None		
	For data that need to be customized in a manner or format that is not readily available, the Corporation shall charge a fee covering minimal charges	Labor Cost (e.g. man-hours): Php75.00 per hour; Computer Time and Operating Costs: Php10.00 per hour; and Printing / Duplication / Reproduction Costs: Php2.00 per page		Planning Officer (Knowledge Resource Unit)
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	Php0.0375 per kilobyte plus the cost of CDs or USB drives to be used		Planning Officer (Knowledge Resource Unit)
	(For Research Organizations / Researchers / Students and Agencies with Jurisdiction over institutions and individuals)			***

	Published and readily available data/tables for public or external use shall be charged	Minimum Processing Fee (for 1-page document print): Php25.00; Additional cost per table / page document print: Php5.00		Planning Officer (Knowledge Resource Unit)
	For data need to be customized in a manner or format that is not readily available, the Corporation shall charge a fee covering minimal incidental charges	Labor Cost (per number of man-hours worked): Php 150.00 per hour; Computer Time and Operating Costs: Php 20.00 per hour; Printing / Duplication / Reproduction costs: Php 5.00 per page		Planning Officer (Knowledge Resource Unit)
	Release of requests for databases (i.e. raw data) shall be subject to approval of Management	Php 0.075 per kilobyte plus the cost of CDs or USB drives to be used to be used.		Planning Officer (Knowledge Resource Unit)

	(Urgent requests will be entertained but shall be subject to higher rate)	(Rate: 10% more than the computed cost of the data request)		Planning Officer (Knowledge Resource Unit)
	(Grant or Deny of the Request for Information)	None		***
	If denied: Write a response letter to the requesting party informing them of the denial of the request. The letter should indicate the grounds for denial and the circumstances on which the denial was based on. Route for appropriate approval If no notice was provided within fifteen (15) working days since the submission of the request, this would indicate that the request was denied	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Receives letter/billing from this office of total amount to be paid (if any)	If granted: Inform or notify the requesting party; including the amount of applicable fees, if any. This should comply with internal rules and procedures on payment of applicable fees	None	1 Hour	Planning Officer (Knowledge Resource Unit)
Requesting party pays the determined amount with the Corporation's Cashier office	Processes the payment	None		Cashier Staff (Cashier office)
Receives official receipt from Cashier	Provides official receipt to requesting party	None	1 Hour	Cashier Staff (Cashier office)
Requesting party presents copy of official receipt to this office as proof of payment	Receives copy of the official receipt as confirmation	None	1 Hour	Planning Officer (Knowledge Resource Unit)

Requesting party receives the data requested.	Sends the requested data	None		Planning Officer (Knowledge Resource Unit)
	TOTAL:	(as applicable)	3 Days	

8. PROVISION OF INPUT TO PROPOSED LEGISLATIVE MEASURES

Office:	Corporate Planning Department - Legislative Unit			
Classification:	Highly Technical			
Type of Transaction:	G2G - Government to Government			
Who May Avail:	Legislative Liaison Officers of other Government Agencies, Senate of the Philippines, House of Representatives			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
1. Letter from the requesting party (hard copy or via e-mail)			Concerned government office/ department/ agency	
1.1. endorsed by the Office of the President and CEO				
1.2. request from concerned party				
2. Copy of the legislative measure requiring PhilHealth's input/opinion/position			Concerned government office/ department/ agency	
3. Comments/recommendations from concerned PhilHealth office/s			Concerned PhilHealth office/s	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Letter request from the requesting party addressed to the Office of the President of PhilHealth stating action required and brief background on the request	1.1. Acknowledge receipt of documents as endorsed by the office of the President and CEO	none	1 hour	Administrative Staff / Legislative Liaison Officer
1.1. endorsed by the President and CEO	1.2. Acknowledge receipt of request from concerned party (through email or hard copy)			
1.2. request from concerned party				
2. Requesting party waits for the result of request	2. Evaluate the request including proposed legislative measure	none	1 hour	Planning Officer (Legislative Unit)
	2.1. Endorsement of documents to concerned offices requesting input on filed bills	none	30 mins	Planning Officer (Legislative Unit)

	2.2. Conduct research on related laws or policies affecting the Corporation and in relation with the proposed legislative measure	none	1 day	Planning Officer (Legislative Unit)
	2.3. Request data to TFI or KM, if necessary	none	1 hour	Planning Officer (Legislative Unit)
	2.4. Concerned offices submits input on proposed legislative measures [(submission of input may differ depending on the required input from concerned offices (e.g., legal opinion, etc.))]	none	5 days	Concerned Offices (e.g., MMG, HFPS, Legal, Actuary, etc.)
	2.5. TFI or KM provides requested data (submission of data request may differ depending on the complexity of needed data)	none	5 days	Concerned Office (TFI or Corporate Planning Department-Knowledge Management Unit)
	2.6. Acknowledge receipt of input from concerned office / TFI / KM	none	1 hour	Planning Officer (Legislative Unit)
	2.7. Clarify provided data from TFI / KM, if necessary	none	1 hours	Planning Officer (Legislative Unit)
	2.8. Assess, gather, and analyze all input/data and draft position paper	none	2 days	Planning Officer (Legislative Unit)
	2.9. Review and finalize draft position paper	none	1 day	Planning Officer (Legislative Unit), Division Chief, Senior Manager (Corporate Planning Department)
	2.10. Route position paper for review and approval of concerned offices	none	1 hour	Administrative Staff
	2.11. Approval of position paper by concerned offices and/or members of the Committee on Legislation	none	5 days	Concerned offices / Members of the Committee on Legislation

	2.11. Receive and document approved position paper	none	1 hour	Administrative Staff
3. Requesting party receives the requested document	3. Send requested data	none	30 mins	Legislative Liaison Officer
	TOTAL:	None	20 days	

OFFICE OF THE CORPORATE SECRETARY

1. ISSUANCE OF MINUTES OF MEETINGS

This is issued to the requesting party on a per request basis, subject to the provisions of Corporate Order No. 2020-0053, Data Privacy Act of 2012 and its IRR.

Office:	Office of the Corporate Secretary			
Classification:	Simple			
Type of Transaction:	G2G (internal)			
Who May Avail:	PhilHealth Regional Offices, Local Health Insurance Offices and Departments/ Offices in the Central Office			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Accomplished Document Reproduction Request Form stating the specific topic and purpose of requested document (1 original copy)		Office of the Corporate Secretary		
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit the Accomplished Document Reproduction Request Form stating topic and purpose of requested document to the Office of the Corporate Secretary	1. Validate the appropriateness of the request	None	10 mins	Division Chief Clerk of Board Corporate Secretary

None	2. Photocopy the document		10 mins	Records Custodian
None	3. Release the requested document		10 mins	Records Custodian
TOTAL:		None	30 mins	

2. ISSUANCE OF PHILHEALTH BOARD RESOLUTIONS (PBRs)

This is issued to the requesting party on a per request basis, subject to the provisions of Corporate Order No. 2020-0053, Data Privacy Act of 2012 and its IRR.

Office:	Office of the Corporate Secretary			
Classification:	Simple			
Type of Transaction:	G2G (internal)			
Who May Avail:	PhilHealth Regional Offices, Local Health Insurance Offices, Departments/ Offices in the Central Office			
CHECKLIST OF REQUIREMENTS	WHERE TO SECURE			
Accomplished Document Reproduction Request Form stating the specific topic and purpose of requested document (1 original copy)		Office of the Corporate Secretary		
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit the Accomplished Document Reproduction Request Form stating topic and purpose of requested document to the Office of the Corporate Secretary	1. Validate the appropriateness of the request	None	10 minutes	Division Chief Clerk of Board Corporate Secretary

None	2. Photocopy the document		10 minutes	Records Custodian
None	3. Release the requested document		10 minutes	Records Custodian
TOTAL:		None	30 mins per PBR	

SECRETARIAT FOR BIDS AND AWARDS COMMITTEE

1. NEGOTIATED PROCUREMENT THRU LEASE OF PRIVATELY OWNED VENUE

Office:	Secretariat for the Bids and Awards Committees			
Classification:	Complex			
Type of Transaction:	G2B/G2G			
Who May Avail:	Suppliers, Contractors, Consultant, End-Users/Cost Centers			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
Endorsement/Memo from End-user (original copy)			End-user	
Purchase Request (PR) (3 original copies)			End-user	
Approved Budget for the Contract (ABC) (2 original copies)			End-user	
Abstract of Canvass with Quotation from at least one (1) venue responded in the RFQ			End-user	
Proof of Invitation from atleast three (3) venues			End-user	
Technical Specifications (GS) approved by the Sector Head (original copy)			End-user	
Copy of Annual Procurement Plan (APP)			End-user	
Copy of Project Procurement Management Plan (PPMP)			End-user	
Copy of Details of Approved Budget			End-user	
Certification that No Gov't facility is available on the date of event			End-user	
Certification of Non-Availability and No suitable training rooms from HRD and SHIA			End-user	
Table Rating Factors of the Lowest/Single Calculated Quotation			End-user	
Approved CPO			End-user	
Updated Mayor's/Business Permit			Lessor	
PhilGeps Registered Number/Red Membership or Platinum Membership			Lessor	
Income/Business Tax Return			Lessor	
Proof of Payment for the updated PhilHealth Contribution (Six Months)			Lessor	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE

1. Received procurement documents from PPPTMT	Receive and check completeness of the procurement documents endorsed by PPPTMT.	None	1 day	SST Point Person
2. Review procurement documents	Review procurement documents and assigned to BAC-Secretariat to handle the project.	None	1 day	SST Head/BAC-Secretariat
3. Raffle Procurement Project to Bids and Awards Committee (BAC) and Technical Working Group (TWG)	Prepare and Issue Notice of Meeting to the assigned BAC members (representative) to conduct raffle face-to-face through videoconferencing to determine who will handle the procurement project	None	1 day	BAC Secretariat
4. Prepare Notice of Meeting	Prepare and Issue Notice of Meeting to assigned BAC for Pre-Procurement Conference to discuss the assigned procurement project/Documents from the Lease of Venue	None	1 day	BAC Secretariat
5. Pre-Procurement Conference	The assigned BAC shall undertake the negotiation with a technically, legally and financially capable supplier, contractor or consultant based on the Technical Specifications, Scope of Work or Terms of Reference prepared by the End-User. Upon successful negotiation, the BAC shall recommend the award of Contract to the HOPE	None	1day	BAC Secretariat/BAC
6. Prepare BAC Resolution	Draft BAC Resolution for review of BAC members	None	1 day	BAC Secretariat
7. Review of BAC Resolution	Emailed draft BAC Resolution for review of BAC members.	None	3 working days	BAC Members
8. Finalize BAC Resolution	Finalize BAC Resolution reviewed by BAC members	None	1 day	BAC Secretariat
9. Signature of BAC Resolution	Route BAC Resolution for signature of all BAC Members	None	2 days	BAC Members
10. Approval of BAC Resolution, Notice of Award and Notice to Proceed	Approval of BAC Resolution, NOA and NTP	None	3 days	Acting President and CEO
11. Endorse to End-User	Endorse approved BAC Resolution, NOA and NTP to End-User	None	1 day	BAC Secretariat
TOTAL:		None	16 days	

2. NEGOTIATED PROCUREMENT THRU SCIENTIFIC, SCHOLARLY OR ARTISTIC WORK, EXCLUSIVE TECHNOLOGY AND MEDIA SERVICES

Office:	Secretariat for the Bids and Awards Committees			
Classification:	Complex			
Type of Transaction:	G2B/G2G			
Who May Avail:	Suppliers, Contractors, Consultant, End-Users/Cost Centers			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
Endorsement/Memo from End-user (original copy)			End-user	
Purchase Request (PR) (3 original copies)			End-user	
Approved Budget for the Contract (ABC) (2 original copies)			End-user	
Technical Specifications/Terms of Reference approved by the Sector Head (original copy)			End-user	
Justification by the End-User on the selected service provider			End-user	
Market Study			End-user	
Copy of Annual Procurement Plan (APP)			End-user	
Copy of Project Procurement Management Plan (PPMP)			End-user	
Copy of Details of Approved Budget			End-user	
Copy of Amended APP/PPMP (if applicable)			End-user	
Mayor's/Business Permit			Supplier/Consultant/Contractor	
BIR Certificate of Registration (for Individual)			Supplier/Consultant/Contractor	
PhilGeps Registered Number			Supplier/Consultant/Contractor	
Income/Business Tax Return (for ABCs above 500K)			Supplier/Consultant/Contractor	
PhilHealth Contribution (Updated for 6 (six) months)			Supplier/Consultant/Contractor	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Received procurement documents from PPPTMT	Receive and check completeness of the procurement documents endorsed by PPPTMT.	None	1 day	SST Point Person
2. Review procurement documents	Review procurement documents and assigned to BAC-Secretariat to handle the project.	None	1 day	SST Head/BAC-Secretariat

3. Raffle Procurement Project to Bids and Awards Committee (BAC) and Technical Working Group (TWG)	Prepare and Issue Notice of Meeting to the assigned BAC and TWG members (representative) to conduct raffle face-to-face through videoconferencing to determine who will handle the procurement project	None	1 day	BAC Secretariat
4. Prepare Notice of Meeting	Prepare and Issue Notice of Meeting to assigned BAC and TWG for Pre-Procurement Conference to discuss the assigned procurement project	None	1 day	BAC Secretariat
5. Pre-Procurement Conference	The assigned BAC shall undertake the negotiation with a technically, legally and financially capable supplier, contractor or consultant based on the Technical Specifications, Scope of Work or Terms of Reference prepared by the End-User. Upon successful negotiation, the BAC shall recommend the award of Contract to the HOPE	None	1day	BAC Secretariat/BAC
6. Prepare BAC Resolution	Draft BAC Resolution for review of BAC members	None	1 day	BAC Secretariat
7. Review of BAC Resolution	Emailed draft BAC Resolution for review of BAC members.	None	3 working days	BAC Members
8. Finalize BAC Resolution	Finalize BAC Resolution reviewed by BAC members	None	1 day	BAC Secretariat
9. Signature of BAC Resolution	Route BAC Resolution for signature of all BAC Members	None	2 days	BAC Members
10. Approval of BAC Resolution, Notice of Award and Notice to Proceed	Approval of BAC Resolution, NOA and NTP	None	3 days	Acting President and CEO
11. Endorse to End-User	Endorse approved BAC Resolution, NOA and NTP to End-User	None	1 day	BAC Secretariat
	TOTAL:	None	16 days	

3. PREPARATION AND FACILITATION OF SIGNING AND APPROVAL OF JOB ORDER (JO) CONTRACTS AND PURCHASE ORDER (PO) CONTRACTS FOR THE PROCESSING OF PURCHASE REQUESTS (PRS)

After the determination of the Single or Lowest Calculated and Responsive Quotation (for goods and infrastructure projects) or Single or Highest Rated and Responsive Proposal (for consulting services) as indicated in the Abstract of Quotation, the PhilHealth and the winning supplier/contractor/consultant will enter into contract for various Modes of Procurement. Job Orders (JOs) are contracts used for procurement of goods and services (e.g. repairs, maintenance, advertising and customization). Purchase Orders (POs) are contracts used for procurement of goods (e.g. supplies and equipment).

Office/Division:	Secretariat for the Bids and Awards Committees
Classification:	Highly Technical
Type of Transaction:	G2B- Government to Business Entity G2G- Government to Government
Who may avail:	Secretariat and Services Team (SST) , End users and Suppliers/Contractor/Consultant
CHECKLIST OF REQUIREMENTS	
WHERE TO SECURE	
Direct Contracting (Section 50)	
Annual Procurement Plan or APP Amendment (1 photocopy)	PHIC Website
Project Procurement Management Plan [PPMP] (1 photocopy)	SBAC
Details of Approved Budget (1 photocopy)	End-user
Continuing Appropriations (if applicable) (1 photocopy)	Comptrollership Department
IT Procurement Clearance/Information System Strategic Plan (ISSP) (for IT procurement) (1 original or photocopy)	End-user
Approved Budget for the Contract [ABC] (1 original or photocopy)	End-user
Purchase Request [PR] (1 original)	End-user
Certification of Sole Distributorship from the manufacturer (1 original)	Supplier's Manufacturer
Quotation from the identified supplier (1 original or photocopy)	Suppliers/Contractor
Justification from the End-user (1 original)	End-user
Mayor's/Business Permit (1 certified true copy)	Suppliers/Contractor/Consultant
PhilGEPS Registration Number or PhilGEPS Certificate of Platinum Membership (1 certified true copy)	Suppliers/Contractor
Income/Business Tax Return (for ABCs above 500k) (1 photocopy)	Suppliers/Contractor

Proof of Payment of PhilHealth Contribution (1 certified true copy or photocopy)	Suppliers/Contractor
Shopping [Section 52.1 (b)]	
Annual Procurement Plan or APP Amendment (1 photocopy)	PHIC Website
Project Procurement Management Plan [PPMP] (1 photocopy)	SBAC
Details of Approved Budget (1 photocopy)	End-user
Continuing Appropriations (if applicable) (1 photocopy)	Comptrollership Department
IT Procurement Clearance/Information System Strategic Plan (ISSP) (for IT procurement) (1 original or photocopy)	End-user
Approved Budget for the Contract [ABC] (if applicable) (1 original or photocopy)	End-user
Purchase Request [PR] (1 original)	End-user
Certificate of Non-Availability of Stocks (CNAS) or Screenshot of non-availability or out of stock with date and time of accessed at Virtual Store (1 print-out or photocopy)	PS-PhilGEPS or PSDBM Virtual Store
Distribution List (for supplies) (1 original)	Secretariat Services Team (SST), PRID
Proof of posting of Request for Quotation (RFQ) at PhilGEPS, PHIC Website and conspicuous place reserve for the purpose [for ABCs 50K and above] (1 print-out or photocopy)	Secretariat Services Team (SST)
Abstract of Quotation with Quotations from at least three (3) Suppliers (2 original)	Secretariat Services Team (SST)
Mayor's/Business Permit (1 certified true copy or photocopy)	Supplier
PhilGEPS Registration Number or PhilGEPS Certificate of Platinum Membership (1 certified true copy)	Supplier
Proof of Payment of PhilHealth Contribution (1 certified true copy or photocopy)	Supplier
Scientific, Scholarly or Artistic Work, Exclusive Technology and Media Services (Section 53.6)	
Annual Procurement Plan or APP Amendment (1 photocopy)	PHIC Website
Project Procurement Management Plan [PPMP] (1 photocopy)	SBAC
Details of Approved Budget (1 photocopy)	End-user
Continuing Appropriations (if applicable) (1 photocopy)	Comptrollership Department
IT Procurement Clearance/Information System Strategic Plan (ISSP) (for IT procurement) (1 original or photocopy)	End-user
Approved Budget for the Contract [ABC] (1 original or photocopy)	End-user

Purchase Request [PR] (1 original)	End-user
Technical Specification for Goods and Services; Terms of Reference for Consulting Services; or Scope of Work for Infrastructure Projects (1 original)	End-user
Market Study (1 original)	End-user
Matrix/Abstract of Canvass (1 original)	End-user
Justification from the End-user (1 original)	End-user
Quotations from suppliers (1 print-out or photocopy)	End-user
BAC Resolution (1 certified true copy)	Secretariat Services Team (SST)
Notice of Award (1 original)	Secretariat Services Team (SST)
Mayor's/Business Permit (1 certified true copy or photocopy)	Supplier
PhilGEPS Registration Number or PhilGEPS Certificate of Platinum Membership (1 certified true copy)	Supplier
Income/Business Tax Return (for ABCs above 500k) (1 photocopy)	Supplier
Proof of Payment of PhilHealth Contribution (1 certified true copy or photocopy)	Supplier
Professional License/Curriculum Vitae (for Consulting Services) (1 certified true copy or photocopy)	Consultant
Small Value Procurement (SVP) [Section 53.9]	
Annual Procurement Plan or APP Amendment (1 photocopy)	PHIC Website
Project Procurement Management Plan [PPMP] (1 photocopy)	SBAC
Details of Approved Budget (1 photocopy)	End-user
Continuing Appropriations (if applicable) (1 photocopy)	Comptrollership Department
IT Procurement Clearance/Information System Strategic Plan (ISSP) (for IT procurement) (1 original or photocopy)	End-user
Approved Budget for the Contract [ABC] (1 original or photocopy)	End-user
Purchase Request [PR] (1 original)	End-user
Matrix/Abstract of Canvass (1 original)	End-user
Technical Specification for Goods and Services; Terms of Reference for Consulting Services; or Scope of Work for Infrastructure Projects (1 original)	End-user
Matrix/Abstract of Canvass (1 original)	End-user

Quotations from suppliers (1 print-out or photocopy)	End-user
Distribution List (for supplies) (1 original)	Secretariat Services Team (SST), PRID
Distribution of Accountability Form (DAF) [for equipment] (1 original)	End-user
Certificate of Non-Availability of Stocks (CNAS) or Screenshot of non-availability or out of stock with date and time of accessed at Virtual Store (1 print-out or photocopy)	PS-PhilGEPS or PSDBM Virtual Store, Secretariat Services Team (SST)
Proof of posting of Request for Quotation (RFQ) at PhilGEPS, PHIC Website and conspicuous place reserve for the purpose [for ABCs 50K and above] (1 print-out or photocopy)	Secretariat Services Team (SST)
Abstract of Quotation with Quotations from at least three (3) Suppliers (2 original)	Secretariat Services Team (SST)
Mayor's/Business Permit (1 certified true copy or photocopy)	Supplier
PhilGEPS Registration Number or PhilGEPS Certificate of Platinum Membership (1 certified true copy)	Supplier
Proof of Payment of PhilHealth Contribution (1 certified true copy or photocopy)	Supplier
Request for Quotation (RFQ)	Supplier, Secretariat Services Team (SST)
Professional License/Curriculum Vitae (for Consulting Services) (1 certified true copy or photocopy)	End-user, Consultant
PCAB License (for Infrastructure) (1 certified true copy)	Contractor
Income/Business Tax Return (for ABCs above 500k) (1 photocopy)	Supplier
Omnibus Sworn Statement (for ABCs above P500K) (1 original or certified true copy)	Supplier/Contractor/Consultant
Performance Security (may be required depending on the nature of the project; required for Infrastructure projects) (1 original)	Supplier/Contractor/Consultant
Evaluation Report of Sample/Prototype from the End-user or Post-Qualification Report by the TWG (if applicable) (1 original)	Secretariat Services Team (SST), End-user, TWG
Sample Design (if applicable) (1 original)	End-user
Direct Purchase of Petroleum Fuel, Oil and Lubricant (POL) Products (Section 53.14)	
Annual Procurement Plan or APP Amendment (1 photocopy)	PHIC Website
Project Procurement Management Plan [PPMP] (1 photocopy)	SBAC
Details of Approved Budget (1 photocopy)	End-user
Continuing Appropriations (if applicable) (1 photocopy)	Comptrollership Department
Approved Budget for the Contract [ABC] (1 original or photocopy)	End-user

Purchase Request [PR] (1 original)		End-user		
BAC Resolution (1 certified true copy)		Secretariat Services Team (SST)		
Notice of Award (1 original)		Secretariat Services Team (SST)		
Technical Specification (1 original)		End-user		
Market Study (1 original)		End-user		
Matrix/Abstract of Canvass (1 original)		End-user		
Distrinbution/ Allocation List (1 original)		End-user		
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE (Position of Supervisor)
1. Endorsed the signed and approved procurement documents (original and/or photocopy) to the Contract Management Team (CMT) for contract processing.	1. Accept the procurement documents and check for completeness.	None	5 minutes	<i>Administrative Officer III Office of the Secretariat for the Bids and Awards Committees</i>
2. Post the required Performance Security.	2. Check if posting of Performance Security (PS) is required.	None	1 day	<i>Administrative Officer III Office of the Secretariat for the Bids and Awards Committees</i>
	2.1 If required, request the supplier to post the prescribed amount and form of Performance Security (PS).			
	2.2 Received PS from the supplier and check form, amount and validity period.			
	2.3 If valid, Endorse original PS to Cash Division for safekeeping.			

3. Wait for the notification stating the availability of the JO/PO for signature via email and/or phone call from CMT personnel.	3. Prepare three (3) copies of Job Order (JO) Contract and/or Purchase Order (PO) Contract with attachments (annex, procurement documents, and documentary requirements) and facilitate the signing and approval.	None	2 days	<i>Administrative Officer III Office of the Secretariat for the Bids and Awards Committees</i>
	3.1 Review correctness and affix initial.		15 minutes	<i>Head Office of the Secretariat for the Bids and Awards Committees</i>
	3.2 Revised JO/PO if with corrections.		15 minutes	<i>Administrative Officer III Office of the Secretariat for the Bids and Awards Committees</i>
	3.3 Sign the initialed JO/PO.		2 minutes	<i>President and CEO Office of the President and CEO</i>
	3.4 Endorse the JO/PO with attachments to the Budget and Admin Section (BAS) of Comptrollership Department for signature and to certify availability of funds.		10 minutes	<i>Administrative Officer III Office of the Secretariat for the Bids and Awards Committees</i>
	3.5 Review, sign and certify the availability of funds of JO/PO.		5 days	<i>Senior Vice President Fund Management Sector</i>

	3.6 Endorse the JO/PO with attachments to the Disbursement Administrative Section (DAS) of Comptrollership Department for signature and to certify availability of funds.		10 minutes	<i>Division Chief Budget and Admin Section</i>
	3.7 Review, sign and certify the availability of funds of JO/PO.		5 days	<i>Senior Vice President Fund Management Sector</i>
	3.8 Forward the budget certified JO/PO with attachments to the authorized PHIC Representative for signature.		10 minutes	<i>Acting Division Chief Disbursement Administrative Section (DAS)</i>
	* Physical Resources & Infrastructure Department (PRID) if the mode of procurement is Direct Contracting, Shopping, and SVP.			
	* Office of the President and Chief Executive Officer (OPCEO) if the mode of procurement is Section 53.6 and 53.14.			
	3.9 Review, sign and approve the budget certified JO/PO.		7 days	
	* PRID			<i>President and CEO Office of the President and CEO</i>
	* OPCEO			<i>Board of Directors</i>
	4.0 Received the signed and approved JO/PO from the PRID or OPCEO.		2 minutes	
4. Sign and conform the JO/PO. *Present authorization letter and photocopy of ID if the signatory is not the same person as the signatory in the submitted RFQ.	4. Notify the supplier/ contractor/ consultant of the availability of JO/PO for signature and acceptance	None	5 minutes	<i>Administrative Officer III Office of the Secretariat for the</i>

				<i>Bids and Awards Committees</i>
	4.1 Give one (1) copy of original signed JO/PO * on the day of signing of JO/PO		1 minute	
	4.2 Post the JO/PO with Approved Budget for the Contract (ABC) above fifty 50 thousand for transparency and compliance at PhilGEPS, PHIC Website and SBAC bulletin board		10 days	
5. Deliver the goods at 15th Floor, Room1501 and coordinate with the end-user of the JO/PO for implementation. * Make sure to comply with the delivery schedule and requirements to prevent imposition of liquidated damages due to delays.	5. Prepare two (2) sets of original or certified true copies (CTC) of procurement documents.	None	1 day	<i>Administrative Officer III Office of the Secretariat for the Bids and Awards Committees</i>
	5.1 Endorsed CTC of JO/PO and procurement documents to COA for post-audit compliance.		10 minutes	
	5.2 Endorsed original copy of JO/PO with CTC procurement documents to PRID or End-user for monitoring of delivery and acceptance.		10 minutes	
	5.3 File and scan JO/PO and procurement documents for records management.		30 minutes	
	TOTAL	None	30 days, 1 hour, 50 minutes	
Preparation and Facilitation of Signing and Approval of Job Order (JO) Contracts and Purchase Order (PO) Contracts for the Processing of Purchase Requests (PRs) is covered by the (a) 2016 Revised Implementing Rules and Regulation (RIRR) of R.A. 9184.				

4. PREPARATION OF POLICIES ON PROCUREMENT PROCESSES

Office:	Secretariat for the Bids and Awards Committees			
Classification:	Highly Technical			
Type of Transaction:	G2G			
Who May Avail:	Cost Centers/End-Users in the Head Office and PhilHealth Regional Offices (PROs), Internal and External Auditors			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
None			None	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Drafting of Policy (original copy)	Drafts policies on procurement processes [i.e. SOPs/WIns/Process Flows re: conduct of the bidding process, conduct of the Alternative Modes/Methods of Procurement, Early Procurement Activities (EPA), preparation of Procurement Monitoring Report, preparation of Agency Procurement Compliance and Performance Indicators (APCPI), preparation of the Approved Budget for the Contract (ABC) Form, etc.]	None	14 Days	SBAC Staff/ Administrative Officer I
2. Review and comments (original submitted hard copy)	The drafted SOP/Wins/Process Flow for review/comments of the SBAC Supervisors	None	3 days	Head PPPTMT, Head SST and Head CMT
	Consolidate and incorporate comments of the SBAC Supervisors	None	1 day	SBAC Staff/ Administrative Officer I
	Provide softcopy of the drafted policies to the PRO counterparts for review and comments.	None	7 Days	PRO counterparts (SBAC in the PROs)
3. Consolidate comments from the PRO counterparts (original copy)	Consolidate and incorporate comments submitted by the PRO counterparts	None	3 Days	SBAC Staff/ Administrative Officer I

4. Assurance that the comments of the PRO counterparts where considered in the finalization of the policies	Deliberates the reviewed and revised policy	None	1 Day	SBAC and PRO counterparts
5. Final Review (original copy)	Final copy of the SOP/Wins/Process Flow for review/comments of the SBAC Head	None	3 Days	SBAC Head
	Incorporates the comments of the SBAC Head to the SOP/Wins/Process Flow, if any	None	1 Day	SBAC Staff
6. Clearance by the Gender and Development (GAD), if applicable	SOP/Wins/Process Flow routed to the GAD for clearance	None	1 Day	SBAC Staff GAD
7. Clearance by the Risk Management	SOP/Wins/Process Flow routed to the Risk Management for clearance	None	1 Day	SBAC Staff Risk Management
8. Clearance issued by GAD and Risk Management	Routing of the SOP/Wins/Process Flow cleared by GAD and RM to the consulted offices	None	1 Day	Consulted Offices: Office of the Sector/Group Head of SBAC All other concerned and support offices
9. Review of the SOP/Wins/Process Flow by all other concerned and support offices	Consolidation of the comments given by all other concerned and support offices	None	3 days	SBAC Staff
10. Determination if the policy needs to be subjected to a validation meeting	If the policy has no contending concerns and there are no notable comments from any of the concerned offices, attach the replies of the concerned offices with the final draft policy for approval and route for approval. Validation meeting is no longer necessary. If the policy has contending concerns and/or there are	None	3 days	SBAC Staff Concerned offices
		None	1 day	SBAC Concerned Offices

The policy needs to be subjected to a validation meeting No consensus built by SBAC and the concerned office Issues which are not resolved at the level of the Execom	notable comments from any of the concerned offices. Call for a validation meeting and subject the policy validation with all the concerned offices. For issues with no consensus built, SBAC shall elevate issues to the ExeCom for resolution and secure copy of SADA and conduct another validation meeting	None	1 day	SBAC Concerned Offices Execom
	SBAC elevates issues to the Board of Directors (BODs) for resolution and secure from the CorSec a copy of the certification of the resolution and conduct another validation meeting to feedback the concerned offices of the decision/instruction of the BODs	None	1 day	SBAC CorSec BODs
11. Approval of the policy	SBAC finalizes the draft policy and route for approval	None	3 Days	SBAC Staff: SBAC Head Senior Social Insurance Specialist Administrative Officer III Administrative Officer I Clerk III
12. Facilitate issuance of policy (original copy)	Once policy is signed by the HOPE, facilitate the following; submission to Records for issuance of corresponding policy , scanning of policy, conversion into portable document format (PDF) and posting at the outlook for information dissemination.	None	1 Day	SBAC Staff: Senior Social Insurance Specialist Administrative Officer III Administrative Officer I Clerk III
Total		None	49 days	

5. PREPARATION OF REQUEST FOR QUOTATION (RFQ) AND ABSTRACT OF QUOTATION (AOQ) FOR THE PROCESS OF NEGOTIATED PROCUREMENT THRU SMALL VALUE PROCUREMENT

Office:	Secretariat for the Bids and Awards Committees			
Classification:	Complex			
Type of Transaction:	G2B/G2G			
Who May Avail:	Suppliers, End-Users/Cost Centers			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
Endorsement/Memo from End-user (original copy)			End-user	
Purchase Request (PR) (3 original copies)			End-user	
Approved Budget for the Contract (ABC) (2 original copies)			End-user	
Matrix of Pre-Canvass with attached Valid Quotations (original copy)			End-user	
Technical Specifications (original copy)			End-user	
Distribution List / Distribution of Accountability Form (for consolidated PRs/items) (original copy)			End-user	
Copy of Annual Procurement Plan (APP)			End-user	
Copy of Project Procurement Management Plan (PPMP)			End-user	
Copy of Details of Approved Budget			End-user	
Copy of Amended APP/PPMP (if applicable)			End-user	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Receiving of Procurement Documents from PPPTMT	Receive and check completeness of the procurement documents endorsed by PPPTMT.	None	1 day	SST Point Person
2. Assigned Canvasser for the Project	Assign a Canvasser to handle the project.	None	1 day	SST Head
3. Prepare Request for Quotation (RFQ)	Preparation of Request for Quotation (RFQ) for the project.	None	1 day	Assigned Canvasser
4. Review Request for Quotation (RFQ)	Review and approval the Request for Quotation.	None	1 day	SST Head

5. Post RFQ to PhilGEPS, PhilHealth Website and Conspicuous Place	If ABC 50K above, posting of RFQ to PhilGEPS, PhilHealth Website and Conspicuous Place. If ABC below 50K, posting of RFQ to PhilHealth Website and sending RFQ to prospective suppliers via email.	None	4 Calendar days	Assigned Canvasser
6. Post RFQ to PhilGeps, PhilHealth Website and Conspicuous Place	If ABC is below 50, posting of RFQ to PhilHealth Website and sending RFQ to prospective suppliers via email	None	3 Working Days	
7. Prepare of Abstract of Quotation (AOQ)	Preparation of AOQ once the posting ends and the Canvasser received at least 1 Quotation (for Small Value Procurement) and at least 3 Quotations (for Shopping).	None	1 day	Assigned Canvasser
8. Request Documentary Requirements to the winning Bidder/Supplier	Requests documentary requirements form the winning Bidder/Supplier via email. List of Primary Requirements: -Mayor's/Business Permit; -PhilGEPS Registration Number; -Notarized Omnibus Sworn Statement (above 50K ABC); -Business/Annual Income Tax Return (above 500K ABC); and -Proof of Updated PhilHealth Contribution.	None	3 days	Assigned Canvasser
9. Review Abstract of Quotation (AOQ)	Review and approval of AOQ and the attached documentary requirements.	None	1 day	SST Supervisor/Head, SBAC
10. Prepare Endorsement Letter to Contract Management Team (CMT)	Prepare endorsement letter and checklist of documents of the completed project. Review and approval of the endorsement letter. Endorsement of the approved AOQ and attachments to CMT for the preparation of Job Order/Purchase Order.	None	1 day	Assigned Canvasser SST Head Assigned Canvasser
TOTAL		None	17 days	

6. PREPARATION OF REQUEST FOR QUOTATION (RFQ) FOR DIRECT CONTRACTING

Office:	Secretariat for the Bids and Awards Committees	
Classification:	Simple	
Type of Transaction:	G2B/G2G	
Who May Avail:	Suppliers, Contractors, End-Users/Cost Centers	
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE
Endorsement/Memo from End-user (original copy)		End-user
Purchase Request (PR) (3 original copies)		End-user
Technical Specifications (original copy)		End-user
Distribution List (if applicable)		End-user
Copy of Annual Procurement Plan (APP)		End-user
Copy of Project Procurement Management Plan (PPMP)		End-user
Copy of Details of Approved Budget		End-user
Copy of Amended APP/PPMP (if applicable)		End-user
Valid Quotation		End-user
Survey of the industry and determine the supply source		End-user
Justification of the necessity of an item that may only be procured through Direct Contracting and must able to prove that there is no suitable substitute in the market that can be obtained at more advantageous terms		End-user
Tax Clearance		End-user
Certification in either of the following conditions:		
Certification from the Supplier/Provider that the good of proprietary nature can only be obtained from the proprietary source (i.e when patents, trade secrets, and copyrights prohibits others from manufacturing the same item)		Supplier

Certification from the Supplier/Provider of exclusive dealership which does not have sub-dealers selling at lower prices and for which no suitable substitute can be obtained at more advantageous terms to the government		Supplier		
Certification from the End-User that the procurement of critical components from the specific suppliers is a conditions precedent to hold a contractor to guarantee its project performance in accordance to the provisions of its contract		End-user		
Updated Mayor's/Business Permit		Supplier		
PhilGeps Registered Number		Supplier		
Income/Business Tax Return (for ABC above 500K)		Supplier		
PhilHealth Contribution (Updated for 6 (six) months)		Supplier		
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Received Procurement Documents from PPPTMT	Receive and check completeness of the procurement documents endorsed by PPPTMT.	None	1 day	SST Point Person
2. Assigned Canvasser for the Procurement Project	Assign a Canvasser to handle the project.	None	1 day	SST Head
3. Prepare Request for Quotation (RFQ)	Preparation of Request for Quotation (RFQ) or pro-forma invoice together with the terms and conditions of sale for the project.	None	1 day	Assigned Canvasser
4. Review Request for Quotation (RFQ)	Review and approval of the Request for Quotation (RFQs).	None	1 day	SST Supervisor
5. Send Request for Quotation (RFQ)	Send RFQ to the identified direct Supplier thru email	None	1 day	Assigned Canvasser
6. Request Documentary Requirements to the Supplier	Requests submission of documentary requirements of the Supplier	None	3 working days	Assigned Canvasser
7.. Review Request for Quotation (RFQ)	Review and approval of RFQ submitted by the Supplier and the attached documentary requirements.	None	1 day	SST Supervisor/Head, SBAC

8.. Prepare Endorsement Letter to Contract Management Team (CMT)	Prepare endorsement letter and checklist of documents of the completed project.	None	1 day	Assigned Canvasser
	Review and approval of the endorsement letter.			SST Supervisor
	Endorsement of the approved AOQ and attachments to CMT for the preparation of Job Order/Purchase Order.			Assigned Canvasser
	TOTAL:	None	10 days	

7. RECEIVING OF PROCUREMENT DOCUMENTS

Office:	Secretariat for the Bids and Awards Committees			
Classification:	Simple			
Type of Transaction:	G2C/G2B/G2G			
Who May Avail:	Cost Centers/End-Users in the Head Office/ Suppliers			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
List of documentary requirements per Corporate Memorandum No. 2023-0010 dated 3 February 2023 and other pertinent Corporate Memorandum			Member / End-user, Comptrollership Department, Government Facility, HRD, SHIA, Lessor, Servicing Agency	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Receipt and recording of procurement related documents	1. Checking the completeness of received documents. 2. Recording of received documents.	None	15 minutes	SBAC Staff/ Administrative Services Assistant C
2. Endorsement of received procurement documents.	1. Endorsement of received procurement documents to the concerned team or the Head of SBAC	None	15 minutes	SBAC Staff/ Administrative Services Assistant C
	TOTAL:		None	30 minutes

8. TRAINING

Office:	Secretariat for the Bids and Awards Committees			
Classification:	Simple			
Type of Transaction:	G2C/G2B/G2G			
Who May Avail:	BAC Members/TWG/ Member/End-Users/ Secretariats in the Head Office and Suppliers			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
1. Training Proposals; 2. Approved Procurement documents; 3. Payment Vouchers		Member / End-user, Comptrollership Department, Government Facility, HRD, SHIA, Lessor, Servicing Agency		
CLIENT STEPS (Internal/External)	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1. Request for the availability of the Resource Person	1. Preparation of invitation addressed to the concerned office. 2. Finalization of scheduled training	None	7 days	SBAC Staff/ Administrative Officer I
2. Preparation of procurement documents	1. Request quotations from at least three (3) lessors for the processing of the lease of venue; 2. Drafting of procurement documents; 3. Submission of procurement documents for BAC recommendation	None	3 days 14 days At least 30 calendar days from the date of activity	SBAC Staff/ Administrative Services Assistant C
4. Finalization of the training proper	1. Coordination with the participants 2. Coordination with the support services from other offices		7 days	
	TOTAL:	None	31 days	