

# **OFFICE OF THE PRESIDENT AND CHIEF EXECUTIVE OFFICER**

## **INTERNAL SERVICES**

**Volume 12**

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

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## OFFICE OF THE PRESIDENT AND CHIEF EXECUTIVE OFFICER

### 1. CORPORATE LEGAL SERVICES

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

<b>Office/Division</b>	Office of the Corporate Legal Counsel			
<b>Classification</b>	HIGHLY TECHNICAL			
<b>Type of Transaction</b>	G2G- Government to Government			
<b>Who may avail:</b>	Office of the President and CEO			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE (Position of Supervisor)</b>
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		3 days (depending on complexing of Legal	Technical Executive Assistant, Office of the Corporate Legal Counsel

	letter or memo reply, comment or instruction to be referred to Corporate Legal Counsel for final evaluation, review and signature		Document, MOA and Contracts	
	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
	<b>TOTAL</b>	<b>None</b>	<b>10 days, 1 hour and 30 minutes</b>	

## 2. MANAGEMENT OF DOCUMENTS

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

<b>Office/Division</b>	Office of the President and CEO			
<b>Classification</b>	Simple			
<b>Type of Transaction</b>	G2G- Government to Government, G2C- Government to Citizens			
<b>Who may avail:</b>	All			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
Cover Letter or Memo of Request				
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE (Position of Supervisor)</b>
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
	<b>TOTAL</b>	<b>None</b>	<b>30 minutes</b>	

### 3. REVIEW OF DOCUMENTS – SIMPLE

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

<b>Office/Division</b>	Office of the President and CEO			
<b>Classification</b>	Simple			
<b>Type of Transaction</b>	G2G- Government to Government, G2C- Government to Citizens			
<b>Who may avail:</b>	All			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
Cover Letter or Memo of Request				
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE (Position of Supervisor)</b>
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
	<b>TOTAL</b>	<b>None</b>	<b>4 hours and 5 minutes</b>	

#### 4. REVIEW OF DOCUMENTS – COMPLEX

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

<b>Office/Division</b>	Office of the President and CEO			
<b>Classification</b>	Complex			
<b>Type of Transaction</b>	G2G- Government to Government, G2C- Government to Citizens			
<b>Who may avail:</b>	All			
<b>CHECKLIST OF REQUIREMENTS</b>		<b>WHERE TO SECURE</b>		
Cover Letter or Memo of Request				
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE (Position of Supervisor)</b>
	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 tracking and scans the document to be routed back to originating unit/office.		1hour	Admin/receiving staff, Office of the President
	<b>TOTAL</b>	<b>None</b>	<b>6 days 1 hour and 5 minutes</b>	



## CORPORATE PLANNING DEPARTMENT

### 1. OFFICE PERFORMANCE SCORECARD (OPS) VALIDATION

The Corporate Planning Department - Performance Management Unit conducts onsite validation of Office Level Scorecard of all offices in the Central Office annually to validate year end performance vis-à-vis Corporate Thrusts and Corporate Scorecard (GCG) and identify how to possibly address challenges that hamper the achievement of each success measure/targets.

Individual reports/ copies of Office Level Scorecard 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.

If you are not the intended recipient, please do not print, copy, retransmit, or otherwise use the information contained herein. If you have received this communication in error, please notify the sender immediately.

Office:	Corporate Planning Department - Performance Management Unit (PMU)			
Classification:	Highly Technical			
Type of Transaction:	G2G - Government to Government Agency			
Who May Avail:	ALL Offices within PhilHealth			
CHECKLIST OF REQUIREMENTS			WHERE TO SECURE	
1. Posted Corporate Order re: Office Level Scorecard			Records and Library Section- Physical Resources and Infrastructure Department / Concerned Offices	
2. Posted Corporate Order re: Strategic Performance and Management System				
3. Posted Memoranda on Performance Rating				
4. Initial Office Performance Scorecard			PhilHealth Offices in the Central Office, Area Offices and OCOO	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
1.Submission of Initial Office Performance Scorecard (OPS) by the respective offices in the Central Office, Area Offices and OCOO thru the google drive link provided as per CorPlan Memorandum	1. Automatic google acknowledgement receipt/response to be sent to concerned office sup on their submission	None	1 Day	Administrative staff (CorPlan Office of the Senior Manager)

1.1 Receive an acknowledgement receipt of the request	1.1 Administrative Staff of the concerned Offices to acknowledge receipt of the request.	None	1 Day	Administrative staff of concerned offices
none	2. PMU staff to review data/report and provide written validation report through the "SPMS OPS Validation Form" signed by the PMU staff, PMU head and pmu Division Chief to concerned offices (review of the initial OPS shall be carefully done going through each perspectives and measures including each target, weight, possible scenarios, resultant scores, initial rating and supporting documents)	None	6 Days	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)
3. Acknowledgement of Concerned Offices	3. Concerned offices to consolidate data/reports and incorporate comments and or suggestion of CorPlan	None	5 days	Technical Staff of Concerned Offices
4. Submit copy of Revised Office Level Scorecard to CorPlan thru the google drive link as provided	4. An auto response/acknowledgement shall be sent to concerned office upon their submission (For cases wherein OPS was emailed to CorPlan-OSM: Administrative Staff of the Office of the Senior Manager of CorPlan to acknowledge receipt then forward to PMU staff thru email)	None	1 Day	Administrative Staff of CorPlan
none	5. PMU staff to review again the revised OPS and ensure that comments given in the initial validation were already reflected in the revised OPS. PMU staff to provide written validation report through a CorPlan Memorandum signed by SM-CorPlan re: Final OPS Validation to concerned offices (review of the revised OPS shall be carefully done going through each perspectives and measures including each target, weight, possible scenarios, resultant scores, initial rating and supporting documents)	None	5 Days	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)
none	5.1 PMU staff to send validation report of the revised OPS with recommendation for approval of the next higher supervisor of the concerned office. (This memo shall be signed by the SM-CorPlan)	none	1 Day	Planning Officer or Staff of the CorPlan - Performance Management Unit (PMU)

	<b>TOTAL:</b>	<b>None</b>	<b>20 Days</b>	
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## 2. PROCESSING OF REQUESTS IN RELATION TO THE EXECUTIVE COMMITTEE

This process covers handling of internal requests through the ExeCom Members and Concerned PhilHealth Offices, following provisions of Corporate Order No. 2020-0038.

<b>Office:</b>	Corporate Planning Department - ExeCom and OSM Support Unit			
<b>Classification:</b>	Complex			
<b>Type of Transaction:</b>	G2G - Government to Government			
<b>Who May Avail:</b>	PhilHealth Offices, PhilHealth Board, internal and inter-agency committees and other concerned government agencies through the ExeCom Members or ExeCom presenters/reource persons.			
<b>CHECKLIST OF REQUIREMENTS</b>		<b>WHERE TO SECURE</b>		
Office Memorandum or formal request letter with the complete title/topic, date of ExeCom presentation and discussion, signature of the Office or Sector Head				
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
Submit or Email letter request to the CorPlan	Receive letter or acknowledge email on the request for data/information	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
	Check files for the documents/ information being requested	None	3 Hours	ExeCom and OSM Support Unit
	Coordinate and discuss with the concerned offices the extent of their requests	None	1 day	ExeCom and OSM Support Unit
	Prepare the requested data:	***	***	***
	For the requests for SADA and/or short transcriptions	None	1 Day	ExeCom and OSM Support Unit
	Long transcriptions, Minutes of Meetings, or audit-related requests covering several topics/concerns and meetings	None	4 Days	ExeCom and OSM Support Unit
	Prepare and Release Memorandum together with the requested data/information	None	4 Hours	ExeCom and OSM Support Unit
	<b>TOTAL:</b>	<b>None</b>	<b>7 days</b>	

### 3. PROCESSING OF RESEARCH/INFORMATION REQUESTS

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

<b>Office:</b>	Corporate Planning Department - Research and Special Studies Unit			
<b>Classification:</b>	Complex			
<b>Type of Transaction:</b>	G2G - Government to Government; G2C - Government to Citizen; G2B - Government to Business			
<b>Who May Avail:</b>	All			
<b>CHECKLIST OF REQUIREMENTS</b>		<b>WHERE TO SECURE</b>		
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.)				
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
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.)			
	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	None	3 Hours	Planning Officer (Research Unit)
	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	
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	Planning Officer (Research Unit)

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

#### 4. REQUESTS FOR INCLUSION IN THE AGENDA OF THE EXECUTIVE COMMITTEE (EXECOM) MEETING

This process covers handling of requests for inclusion in the Agenda of the ExeCom meeting following provisions of Corporate Order No. 2020-0038.

Office:	Corporate Planning Department - ExeCom and OSM Support Unit			
Classification:	Simple			
Type of Transaction:	G2G - Government to Government			
Who May Avail:	PhilHealth Offices, PhilHealth Board, internal and inter-agency committees and other concerned government agencies through the ExeCom Members or ExeCom presenters/reource persons.			
CHECKLIST OF REQUIREMENTS		WHERE TO SECURE		
Agenda Request Form		Proforma attached to CO 2020-0038; ExeCom Secretariat		
Presentation Materials				
Briefer/Narrative, Draft Policy (if applicable)				
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Submit properly filled out and signed Agenda Request Form (at least five working days prior to the ExeCom Meeting)	Receive or acknowledge (if emailed) the submitted Agenda Request Form and the required attachments	None	1 Hour	Administrative Staff (Office of the Senior Manager / OSM)
	Check the submitted form and the attached documents	None	1 Hour	ExeCom and OSM Support Unit
	Coordinate/email the concerned offices for any concerns that the ExeCom might need: budgetary implications, risks involved, timelines, etc.	None	2 Hours	ExeCom and OSM Support Unit
Comply with the requirements of teh ExeCom as discussed with the ExeCom Secretariat (at least 3 days prior to the ExeCom meeting)	Receive the adjusted documents (briefer, presentation materials, policy) and the supporting documents	None	2 days	ExeCom and OSM Support Unit



	Inform the proponent office of the inclusion of their item in the Agenda	None	2 Hours	ExeCom and OSM Support Unit
	Discuss agenda inclusions with the OCOO and OPCEO, and prepare the Notice of Meeting	None	2 Hours	ExeCom and OSM Support Unit
	<b>TOTAL:</b>	<b>None</b>	<b>3 days</b>	

## 5. REQUEST FOR INCLUSION OF CORPORATE ACTIVITIES TO THE CORPORATE CALENDAR

*Description of the Service: This refers to the request of the offices for inclusion of their respective corporate activities to the online corporate calendar per Corporate Order No. 2021-0060 re Planning, Coordinating and Scheduling of Corporate Activities in the Corporate Calendar (Revision 1)*

<b>Office:</b>	Corporate Planning Department			
<b>Classification:</b>	complex (7 days)			
<b>Type of Transaction:</b>	G2G (Internal)			
<b>Who May Avail:</b>	All Offices/ employees			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
OS: Linux, Windows, Mac, Android, etc.			Requesting Party	
Internet Connection			Requesting Party	
CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
	1.1 Releasing of CorPlan Memorandum requiring all offices to plan their corporate activities based on the Corporate Priority Activities	None	1 hour	Planing Officer/ Planning Officer III/ Senior Manager
Offices: Submit their priority calendar of activities	1.2 Receive Request for inclusion of Corporate Activities (from Priority Offices) (Corporate Secretary, HFPS, MMG, OP, Corplan and OCOO) and endorse to Planning Unit	None	1 hour	Administrative Assistant/Clerk/ -CorPlan
Core Offices encodes Priority Activities to Corporate Calendar	1.3 Monitor the encoding of respective offices while encodes their corporate activities using onlice corporate calendar system.	none	1 day	Planning Assistant II/Planning Officer II
Client send email requesting to fix the system	1.4 If Offices experience problem with the system: CorPlan assist the clients to fix the system (for simple)	none	1 hour	Planning Assistant II/ Planning Officer II
	1.5 If Offices experience problem requiring Technical Assistance: CorPlan endorse the problem	none	1 hour	Planning Assistant II/ Planning Officer II

All other offices encodes their respective Corporate Activities	1.6 Release Memo requiring all other Offices (support offices) to encode their respective Corporate Calendar Activities	none	2 hours	Planning Officer II/Unit Head
	1.7 Evaluate online the Corporate Activities encoded by Offices	none	2 days	Planning Assistant/Planning Officer II/ Planning Officer II
Clients view the evaluated Corporate Calendar	1.8 Recommend approval to the EVP and COO thru a memorandum (approval Online and Hard Copy )	none	1 hour	Planning Officer III/ Unit Head/Division Chief/Senio Manager
	1.7 Endorse to the OCOO for approval	none	1 hour	Administrative Assistant/Clerk/ -CorPlan
	--end--			
Processing of Approved/Disapproved Corporate Activities:	2.1 Received approved/disapproved Corpoarte Activities	none	1 hour	Administrative Assistant/Clerk/ -CorPlan
	2.2 Review the approved Corporate Activities then print	none	2 hours	Planning Assistant II/ Planning Officer II
	2.3 If disapproved: Informed the concern offices thru memo	none	2 hours	Planning Officer II/ Planning Officer III/ Senior Manager
	2.4 If approved: proceed to release: Printed copy endorsed and cascaded thru outlook	none	2 hour	Planning Assistant II
	2.5 Forwarded to Recrods (PRID) for posting	none	1 hour	Administrative Assistant/Clerk/ -CorPlan
	--end--			
Request for Change of date of activities to the Corporate Calendar	3.1 Receive Request for reschedule of activities	none	2 hours	Administrative Assistant assigned to the Office of the Manager CorPlan
	3.2 Endorse the Request to Planning Unit	none	1 hour	Administrative Assistant assigned to the Office of the Manager CorPlan

	3.2 Received the endorse request by Planning Unit	none	1 hour	Planning Assistant II
	3.3 Review and check the availability of slots to the Online Corporate Calendar using the OCC system installed	none	1 hour	Planning Assistant II/Planning Officer II
	3.3 Upon checking if the slot still available, the Planning Assistant recommend approval by clicking on the systems "evaluated and recommend for approval" to the system	none	1 hour	Planning Assistant/Planning Officer (Planning Unit)
	3.4 Forward to the Office of the Chief Operating Officer for approval	none	1 hour	Administrative Assistant assigned to the Office of the Manager CorPlan
	<b>TOTAL:</b>	<b>None</b>	<b>7 days</b>	

## 6. REVIEW OF DRAFT POLICIES (CORPORATE ORDER AND PHILHEALTH CIRCULAR)

*Description of the Service: This process covers review and assessment of draft corporate policies to ensure its compliance to existing rules and protocols, as*

*well as its congruence to corporate plans and targets, and existing issuances.*

<b>Office:</b>	Corporate Planning Department - Policy Management Unit			
<b>Classification:</b>	Highly Technical			
<b>Type of Transaction:</b>	G2G - Government to Government			
<b>Who May Avail:</b>	All offices within the Corporation			
<b>CHECKLIST OF REQUIREMENTS</b>		<b>WHERE TO SECURE</b>		
1. Check the submitted draft policies as to completeness of submission SOP-01-01-001		Corporate Planning Department Policy Management Unit		
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
1. Submit Complete Staff Work (CSW) draft policy documents  Note: Only policy issuances are subjected for review (Corporate Order and PhilHealth Circular)	1. Check the submitted draft policies as to completeness of submission  1,1. CSW Requirements: 1.1.1. Draft policy is consistent with policy form and style 1.1.2. Consistent with the prescribed standard sections of the policy issuance (Rationale, Objectives, Scope, Definition of Terms, Policy Statements, Date of Effectivity for new policies. For revised policies, section on Repealing Clause is required, and other relevant sections as applicable)	N/A	1 day to 2 days* depending on volume of submission of draft policies	Receiving Personnel Office of the Senior Manager  Note: Only complete documents shall be received and processed.

	1.1.3. Accomplished policy forms A to E 1.1.4. Submission of Gender and Development (GAD) and Risk Assessment Certificates			
2. Criteria for review	2. Review draft policies with CSW for review approval of Head of Policy Management, Unit level	N/A	5 days	Policy Management Unit Personnel
2.1. Anchored on Policy Agenda/Corporate Priorities/Directives	2.1. Review draft policies with CSW with recommendation for review approval of Division Chief	N/A	5 days	Head, Policy Management Unit
2.2. Appropriate use of policy issuance (PhilHealth Circular - for external stakeholders; Corporate Order - for internal stakeholders)	2.2. Review draft policies with CSW with recommendation for review approval of Senior Manager	N/A	5 days	Division Chief (managing the Unit)
2.3. Adherence to policy content, format and style standards	2.3. Review draft policies with CSW with recommendation for review approval of EVP-COO of PhilHealth	N/A	5 days	Senior Manager Corporate Planning Department
2.4. With supporting documents to support the Rationale of the policy (i.e. PhilHealth Board Resolutions, among others)				
	<b>TOTAL:</b>	<b>None</b>	<b>20 days</b>	

## 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.*

<b>Office:</b>	Office of the Corporate Secretary			
<b>Classification:</b>	Simple			
<b>Type of Transaction:</b>	G2G (internal)			
<b>Who May Avail:</b>	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
<b>TOTAL:</b>		<b>None</b>	<b>30 mins</b>	



## 2. ISSUANCE OF BOARD AND COMMITTEE DIRECTIVES

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.

<b>Office:</b>	Office of the Corporate Secretary			
<b>Classification:</b>	Simple			
<b>Type of Transaction:</b>	G2G (internal)			
<b>Who May Avail:</b>	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
	2. Photocopy the document		10 mins	Records Custodian
	3. Release the requested document		10 mins	Records Custodian
<b>TOTAL:</b>		<b>None</b>	<b>30 mins</b>	

### 3. 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.

<b>Office:</b>	Office of the Corporate Secretary			
<b>Classification:</b>	Simple			
<b>Type of Transaction:</b>	G2G (internal)			
<b>Who May Avail:</b>	PhilHealth Regional Offices, Local Health Insurance Offices, Departments/ Offices in the Central Office			
<b>CHECKLIST OF REQUIREMENTS</b>	<b>WHERE TO SECURE</b>			
Accomplished Document Reproduction Request Form stating the specific topic and purpose of requested document (1 original copy)		Office of the Corporate Secretary		
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>			
		<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
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
<b>TOTAL:</b>		<b>None</b>	<b>30 mins per PBR</b>	

#### 4. ISSUANCE OF SECRETARY'S CERTIFICATE

*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*

<b>Office:</b>	Office of the Corporate Secretary			
<b>Classification:</b>	Simple			
<b>Type of Transaction:</b>	G2G (internal)			
<b>Who May Avail:</b>	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	15 mins	Division Chief Clerk of Board Corporate Secretary
None	2. Retrieve the original PBR for reference.		10 mins	Records Custodian

None	3. Prepare the Secretary's certificate		15 mins	Records Custodian
None	4. Sign the Secretary's Certificate		10 mins	Corporate Secretary
None	5. Release the notarized Certificate with the OCS retaining one (1) original copy		10 mins	Records Custodian
<b>TOTAL:</b>		<b>None</b>	<b>1 hour</b>	

## ORGANIZATION AND SYSTEMS DEVELOPMENT OFFICE

### 1. PROCEDURAL DOCUMENT REVIEW

*Review of procedural documentations of office processes, law, regulations and corporate policy implementation such as Standard Operating Procedures (SOP) and Work Instructions (WINs) in conformity to the implementation of the Corporation's Quality Management System (QMS) certified under ISO 9001:2015 Standards.*

<b>Office:</b>	Organization and Systems Development Office			
<b>Classification:</b>	Highly Technical			
<b>Type of Transaction:</b>	G2G			
<b>Who May Avail:</b>	All PhilHealth Program Offices (Proponent)			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
Original Signed Request for Review of Procedural Document (memorandum) endorsed by the Head of Organizational Unit (1 Copy)			To be provided by the Proponent Office	
Document Routing Slip (Original Copy)			To be provided by the Proponent Office	
Document Review and Approval Request Form (DRAR) signed by head of the proponent office (Original Copy)			To be provided by the Proponent Office	
Risk Assessment Certification issued by the PMT-Risk (Original Copy)			To be provided by PMT-Risk Office	
Legal Opinion issued by the Internal Legal Department (Optional) (Original Copy)			To be provided by Internal Legal Department	
Draft of the Procedural Document (SOP or WINs) with corresponding watermark (Original or Photocopy)			To be provided by the Proponent Office	
Editable electronic copy of the draft of the Procedural Document (SOP or WINs) to be sent to the official Microsoft Outlook email address of OSDO			To be provided by the Proponent Office	
Annexes (required forms or documentary information that will be used in the implementation)			To be provided by the Proponent Office	
References (law, regulation, corporate policy and documentations where the Procedural Document is based)			To be provided by the Proponent Office	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>

1. Submit required documents for initial assessment and verification	1.1. Receipt of documents and electronic copy of the draft procedure documents that are to be subjected for review.	None	30 minutes	Clerk III/Administration Services Assistant C (ASA C) - OSDO Business Process Improvement Team
	1.2. Record of document details in the Document Tracking System			
	1.3. Endorse documents to Supervising Management Specialist.			
None	2.1. Receipt of endorsed documents	None	1 working day	Supervising Management Specialist - OSDO Business Process Improvement Team
	2.2. Evaluation of endorsed documents			
	2.3. Assignment to Management Specialist II for review			
	3.1. Review of the procedure documents vis-à-vis the conformity to the established Quality Management System requirements of the Corporation and compliance to existing laws, rules, corporate policy, etc. which may include provision of comments and suggestions on the subject matter.	None	17 working days	Management Specialist II - OSDO Business Process Improvement Team
	3.2. Submission of review and comments provided to the Supervising Management Specialist with indication of the date of completion in the Document Routing Slip.			
	4.1. Receipt of the reviewed procedural document.	None	1 working day	Supervising Management Specialist - OSDO Business Process Improvement Team
	4.2. Review of the output of the Management Specialist II.			
	4.2.1 Endorses to the Clerk III/Administration Services Assistant C (ASA C) the reviewed and concurred output of the reviewing Management Specialist II.			
	4.2.2 Returns to the reviewing Management Specialist II for incorporation of corrections, additional comments and suggestions, if there are any.			

None	5.1 Receipt of reviewed procedural documents with recommendation for approval from the Supervising Management Specialist	None	1 minute	Clerk/ Administration Services Assistant C (ASA C) - OSDO Business Process Improvement Team
	5.2 Endorsement of reviewed procedural documents to the Department Manager for approval	None	1 minute	1 minute
	6.1 Review and approval of the reviewed procedure document	None	2 days	Department Manager OSDO
None	6,2 Release of approved reviewed procedure documents to Clerk / Administration Services Assistant (ASA C)	None	1 minute	Department Manager OSDO
	7.1. Receipt of reviewed procedure document and attachments	None	30 minutes	Clerk/ Administration Services Assistant C (ASA C)
	7.2. Record of document details in the Document Tracking System.			
2. Receipt of approved reviewed procedure documents	7.3. Release of documents to the proponent office.	None	30 minutes	
	<b>TOTAL:</b>	<b>None</b>	<b>20 days</b>	



## 2. STAFFING ASSESSMENT

*Determining the changes in the number of positions needed in the targeted positions/jobs in the future. The staffing assessment requires carefully thinking about the numbers of staff needed to fulfill the current and future workforce needs. In projecting the staffing needs for the future - the assessment should be based on realistic projections.*

<b>Office:</b>	Organization and Systems Development Office
<b>Classification:</b>	Highly Technical
<b>Type of Transaction:</b>	G2G
<b>Who May Avail:</b>	Heads of Organizational Units (Departments/Offices/Sectors)
CHECKLIST OF REQUIREMENTS	WHERE TO SECURE
<p>1 original or photocopy of the following: Request for Staffing Assessment (memorandum) endorsed by the Head of Organizational Unit that provides the following information:</p> <p>1) Considerations in future staffing needs: a) Policy change/new initiative - new program initiatives or "reforms" may have significant staffing implications; b) Mandated Regulatory Changes - work requirements that change as a result of laws, rules and regulations; c) Planned growth/expansion - The demand for services can changes as a result of population shifts, unemployment rates, or any other social issued that the demand for human services; and d) Other factors affecting staffing - Any number of other factors may change staffing requirements. Technological innovations may reduce the number of employees needed to do the same amount of work. Staffing ratios may change as a result of available resources and shifting priorities. It is important to identify the effectivity date of the aforementioned considerations as well as whether these considerations are firm (final/approved) or projected (awaiting approval/in the pipeline).</p> <p>2) Likely impact of workload (e.g. increase/decrease in tasks, volume/quantity, response time).</p> <p>3) Anticipated changes in staffing (increase/decrease in full-time equivalents (FTEs)) and projected effectivity date.</p> <p>4) Competency requirements for the positions/jobs.</p>	N/A

CLIENT STEPS	AGENCY ACTION	FEES TO BE PAID	PROCESSING TIME	PERSON RESPONSIBLE
Forwards Request for Staffing Assessment, complete with the supporting documents.	1. Receives Request for Staffing Assessment, including the supporting documents.	None	10 mins	Administrative staff, OSDO
None	2. Evaluates request, and prepares action and release documents.	None	10 working days	Technical staff, OD Team
None	3. Reviews action and release documents, and endorses to Senior Manager for approval of the recommendation.	None	5 working days	OD Team Lead
None	4. Reviews action and release documents, and approves/disapproves the recommendation.	None	5 working days	Senior Manager, OSDO
None	5. Forwards action and release documents to the concerned/requesting organizational unit.	None	Within the day the action and release document were signed by the Senior Manager	Administrative staff, OSDO
	<b>TOTAL:</b>	<b>NONE</b>	<b>20 working days</b>	

## SECRETARIAT FOR BIDS AND AWARDS COMMITTEE

### 1. NEGOTIATED PROCUREMENT THRU LEASE OF PRIVATELY OWNED VENUE

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Complex			
<b>Type of Transaction:</b>	G2B/G2G			
<b>Who May Avail:</b>	Suppliers, Contractors, Consultant, End-Users/Cost Centers			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
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	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>

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
<b>TOTAL:</b>		<b>None</b>	<b>16 days</b>	

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

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Complex			
<b>Type of Transaction:</b>	G2B/G2G			
<b>Who May Avail:</b>	Suppliers, Contractors, Consultant, End-Users/Cost Centers			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
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	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
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
	<b>TOTAL:</b>	<b>None</b>	<b>16 days</b>	

### **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).

<b>Office/Division:</b>	Secretariat for the Bids and Awards Committees
<b>Classification:</b>	Highly Technical
<b>Type of Transaction:</b>	G2B- Government to Business Entity G2G- Government to Government
<b>Who may avail:</b>	Secretariat and Services Team (SST) , End users and Suppliers/Contractor/Consultant
<b>CHECKLIST OF REQUIREMENTS</b>	
<b>WHERE TO SECURE</b>	
<b>Direct Contracting (Section 50)</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] (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
<b>Shopping [Section 52.1 (b)]</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
<b>Scientific, Scholarly or Artistic Work, Exclusive Technology and Media Services (Section 53.6)</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] (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
<b>Small Value Procurement (SVP) [Section 53.9]</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] (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
<b>Direct Purchase of Petroleum Fuel, Oil and Lubricant (POL) Products (Section 53.14)</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
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	
	<b>TOTAL</b>	<b>None</b>	<b>30 days, 1 hour, 50 minutes</b>	

#### 4. PREPARATION OF APP AMENDMENT

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Highly Technical			
<b>Type of Transaction:</b>	G2G- Government to Government			
<b>Who May Avail:</b>	End users , Budget Officer Designate			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
1. PPMP Amendment Form 2. Source of Fund 3. Technical Specification (if applicable)			End-User	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
1. Submission of PPMP Amendment Form with attached budget source and technical specification of the Projects/Activities/Programs to be amended (original copy)	1. Initial review of the submitted PPMP Amendment Form with attached budget source and technical specification of the Projects/Activities/Programs to be amended	None	1 day	SBAC Staff : Clerk III
*Submission of PPMP Amendment Forms for correction/compliance by the End-user/Cost Center	1.1 Thorough review of the corrected PPMP Amendment Forms submitted by the End-user/Cost Center	None	1 day	SBAC Staff : Clerk III
	1.2 Collate all the submitted PPMP Amendment forms from the End-User/ Cost Centers	None	3 days	SBAC Staff : Clerk III
	Consolidation of the submitted PPMP Amendment Forms and the corresponding proposed modes of procurement projects submitted by various Cost-	None	3 days	SBAC Staff :

	Centers into APP Amendment			Clerk III
	1.3 Review of the consolidated APP Amendment	None	1 day	Administrative Officer I
	1.4 Approval of the APP Amendment as to consolidation	None	1 day	Administrative Officer III
				Head of SBAC
2. Facilitate on the deliberation of the proposed amendments on the Annual Procurement Plan	2. Deliberation of the proposed PPMP Amendments and recommendation for the approval of the amendments on the Annual Procurement Plan through BAC-APP meeting	None	1 Day	Head of SBAC Senior Social Insurance Specialist Administrative Officer III Administrative Officer I Clerk III
	2.2 Drafting of BAC-APP Resolution recommending the approval of the amendments on the Annual Procurement Plan	None	1 Day	Clerk III
3. Review and comment on the Draft BAC-Resolution recommending the approval of the amendments on the Annual Procurement Plan	3. Routing of the BAC-Resolution recommending the approval of the amendments on the Annual Procurement Plan to the BAC Chairperson, Vice Chairperson and BAC Members for review/ comments and signature with the attached consolidated APP Amendment	None	6 Days (1 day per BAC Member)	Clerk III
	3.1 Consolidate and incorporate all the comments of the BAC-APP if any	None	1 day	Clerk III
	3.2 Drafting of Corporate Memorandum regarding the approval of the amendment of the Annual	None	1 day	SBAC Staff: Clerk III



	Procurement Plan	None	1 day	Head of SBAC
	3.3 Review of the Drafting of Corporate Memorandum regarding the approval of the amendment of the Annual Procurement Plan			
4. Review and Approval of the Resolution on the amendment of the Annual Procurement Plan and the corresponding modes of procurement by the Head of Procuring Entity (HoPE)	Routing of the consolidated APP Amendment, Resolution signed by the BAC-APP Chairperson, Vice Chairperson and BAC Members, and the Draft Corporate Memorandum regarding the approval of the amendment of the Annual Procurement Plan and the corresponding modes of procurement for review and approval by the Head of Procuring Entity (HoPE)	None	7 days	Head of Procuring Entity
	Incorporate comments of the HoPE if any	None	1 day	SBAC Staff: Clerk III
				SBAC Staff: Clerk III
	<b>TOTAL</b>	<b>None</b>	<b>29 days</b>	

## 5. PREPARATION OF POLICIES ON PROCUREMENT PROCESSES

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Highly Technical			
<b>Type of Transaction:</b>	G2G			
<b>Who May Avail:</b>	Cost Centers/End-Users in the Head Office and PhilHealth Regional Offices (PROs), Internal and External Auditors			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
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
<b>Total</b>		<b>None</b>	<b>49 days</b>	

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

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Complex			
<b>Type of Transaction:</b>	G2B/G2G			
<b>Who May Avail:</b>	Suppliers, End-Users/Cost Centers			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
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	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
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
<b>TOTAL</b>		<b>None</b>	<b>17 days</b>	

## 7. PREPARATION OF REQUEST FOR QUOTATION (RFQ) FOR DIRECT CONTRACTING

<b>Office:</b>	Secretariat for the Bids and Awards Committees	
<b>Classification:</b>	Simple	
<b>Type of Transaction:</b>	G2B/G2G	
<b>Who May Avail:</b>	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	1. Receive and check completeness of the procurement documents endorsed by PPPTMT.	None	1 day	SST Point Person
2. Assigned Canvasser for the Procurement Project	2. Assign a Canvasser to handle the project.	None	1 day	SST Head
3. Prepare Request for Quotation (RFQ)	3. 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)	4. Review and approval of the Request for Quotation (RFQs).	None	1 day	SST Supervisor
5. Send Request for Quotation (RFQ)	5. Send RFQ to the identified direct Supplier thru email	None	1 day	Assigned Canvasser
6. Request Documentary Requirements to the Supplier	6. Requests submission of documentary requirements of the Supplier	None	3 working days	Assigned Canvasser
7.. Review Request for Quotation (RFQ)	7. 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)	<p>8. Prepare endorsement letter and checklist of documents of the completed project.</p> <p>Review and approval of the endorsement letter.</p> <p>Endorsement of the approved AOQ and attachments to CMT for the preparation of Job Order/Purchase Order.</p>	None	1 day	<p>Assigned Canvasser</p> <p>SST Supervisor</p> <p>Assigned Canvasser</p>
	<b>TOTAL:</b>	<b>None</b>	<b>10 days</b>	

## 8. RECEIVING OF PROCUREMENT DOCUMENTS

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Simple			
<b>Type of Transaction:</b>	G2C/G2B/G2G			
<b>Who May Avail:</b>	Cost Centers/End-Users in the Head Office/ Suppliers			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
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	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
1. Receipt and recording of procurement related documents	1.1. Checking the completeness of received documents. 1.2. Recording of received documents.	None	15 minutes	SBAC Staff/ Administrative Services Assistant C
2. Endorsement of received procurement documents.	2. Endorsement of received procurement documents to the concerned team or the Head of SBAC	None	15 minutes	SBAC Staff/ Administrative Services Assistant C
	<b>TOTAL:</b>		<b>None</b>	<b>30 minutes</b>

## 9. TRAINING

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Simple			
<b>Type of Transaction:</b>	G2C/G2B/G2G			
<b>Who May Avail:</b>	BAC Members/TWG/ Member/End-Users/ Secretariats in the Head Office and Suppliers			
<b>CHECKLIST OF REQUIREMENTS</b>		<b>WHERE TO SECURE</b>		
1. Training Proposals; 2. Approved Procurement documents; 3. Payment Vouchers		Member / End-user, Comptrollership Department, Government Facility, HRD, SHIA, Lessor, Servicing Agency		
<b>CLIENT STEPS (Internal/External)</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
1. Request for the availability of the Resource Person	1.1 Preparation of invitation addressed to the concerned office. 1.2. Finalization of scheduled training	None	7 days	SBAC Staff/ Administrative Officer I
2. Preparation of procurement documents	2.1 Request quotations from at least three (3) lessors for the processing of the lease of venue;  2.2 Drafting of procurement documents;  2.3. 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
3. Finalization of the training proper	1. Coordination with the participants 2. Coordination with the support services from other offices		7 days	
	<b>TOTAL:</b>	<b>None</b>	<b>31 days</b>	

## 10. VALIDATION OF PROCUREMENT DOCUMENTS

<b>Office:</b>	Secretariat for the Bids and Awards Committees			
<b>Classification:</b>	Highly Technical			
<b>Type of Transaction:</b>	G2G			
<b>Who May Avail:</b>	Cost Centers/End-Users in the Head Office			
<b>CHECKLIST OF REQUIREMENTS</b>			<b>WHERE TO SECURE</b>	
List of documentary requirements per Corporate Memorandum No. 2023-0010 dated 3 February 2023			Member / End-user, Comptrollership Department, Government Facility, HRD, SHIA, Lessor, Servicing Agency,	
<b>CLIENT STEPS</b>	<b>AGENCY ACTION</b>	<b>FEES TO BE PAID</b>	<b>PROCESSING TIME</b>	<b>PERSON RESPONSIBLE</b>
1. Performs initial Annual Procurement Plan (APP) and Corporate Operating Budget (COB) validation of procurement documents.	1. Verification of the projects/ activities if it is included in the approved APP, APP Amendment and Approved Corporate Operating Budget (COB) 2. Checking of correctness of the documents submitted. If documents have deficiency/ies, 2.1 return the documents and advise the client accordingly;	None	3 Days	SBAC Staff/ Clerk
2. Review and comments	Review of the verified projects/ activities in the APP, APP Amendment and approved COB and the correctness of the documents verified.	None	3 days	SBAC Staff/ Administrative Officer I
3. Final review and approval of the validated procurement documents	Approval of the validated procurement documents.	None	3 Days	SBAC Staff/ Administrative Officer I
4. Endorsement of approved validated procurement document	Numbering of Purchase Requests (PRs) , recording and encoding in the SBAC Procurement Monitoring Database	None	1 Day	SBAC Staff/ Clerk

	Endorsement of the approved validated procurement documents.			
	<b>TOTAL:</b>	<b>None</b>	<b>10 days</b>	