ARIZONA
PROCUREMENT PORTAL

Creating and Closing Improvement Plans

This document is a quick-reference guide for members of the SM team who need to create improvement plans in the Arizona Procurement Portal (APP.) If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO Website: https://spo.az.gov/.

An improvement plan will allow you to create tasks to help address poor supplier performance. Tasks can be assigned to specific owners with a due date. It is important to understand that you can link performance assessments and corrective action requests to an improvement plan. After creating the improvement plan, you can initiate the plan and alert the supplier.

Creating an Improvement Plan

1. From any page in APP, navigate to the **Suppliers** drop-down menu and select **Improvement Plans.**
2. Select **Create New Improvement Plan**. This will redirect you to the **General Info** tab of the Improvement Plan.
3. Under Plan Identity, create a **Label** and link the **Supplier**.

4. Under Scope, you can link the **Organization** and **Commodity**. Under Origin, you can link the **Performance Assessment Campaign** or **Corrective Action Request**. Please note that these are not mandatory, only fields with a red border are mandatory.

5. After completing information in the **General Info** tab, select **Save**. This will allow access to the **Tasks** tab.
6. Navigate to the **Tasks** tab to the left of the screen. Select **Add a Contact**.

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Creating an Improvement Plan (continued)

Note: A task is something that you can assign to someone within the State, or a supplier contact. You can define start and end dates, group a series of tasks, nest tasks as Parent/Child, and track progress. You can also add comments for the whole group to view. The supplier is also able to add tasks, but only has the ability to assign a task to the supplier's users in the system.

7. A pop-up window will appear. Select the **checkbox** next to the name of anyone else you would like to link to this improvement plan. Select **Close** to close the window.
    *   **Note**: you will be automatically identified as Responsible for the Improvement Plan and additional contacts will be identified as Contributors.
8. To add a task, select **Add a Task** under the Schedule section of the **Task** tab.
9. Fill in the **Code**, **Type**, **Manager**, and **Label** for the task. Also, update the **Initial Begin Date** and **End Date**.

10. Select **Save & Close** or **Save & New** to create another task. Once all tasks are loaded, select **Save**. Now, the improvement plan is open and in progress.

Closing an Improvement Plan

1. Navigate to the **Suppliers** drop-down and select **Improvement Plans.**
2. Use the search bar to find the improvement plan you would like to close.
3. Once you have located the plan, click the **Pencil** icon to open the plan.
4. Navigate to the **General Info** tab and update the **Status** to completed.

5. Click **Save.** The improvement plan is closed and will now be marked as completed.