ARIZONA
P R O C U R E M E N T   P O R T A L
QUICK REFERENCE GUIDE

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 allows 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 **Collaboration Plans**.
2. Select **Create New Improvement Plan**. This redirects you to the **General Info** tab of the Improvement Plan.
3. Complete the **Plan Type**, **Supplier** and **Plan Label** fields in the Plan Description section.

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. Click **Save**.
6. The Team Tasks left margin tab populates for access.
7. Click the **Team Tasks** left margin tab open.
8. Click the **Add a Task** button.

> *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.*

9. Use the **Select user(s)** dropdown to select the name of anyone else you would like to link to this improvement plan.
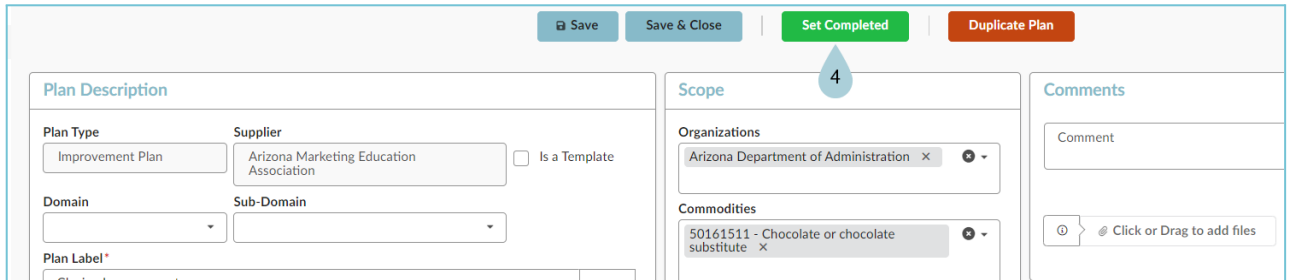
> *You are automatically identified as Responsible for the Improvement Plan, additional contacts will be identified as Contributors.*

10. Click **Add a Task** under the Tasks List and Timing section to add tasks.
11. Fill in the **Code, Step, Type,** and **Manager** in the Information section.
12. Complete the **Initial Begin Date** and **End Date**.
13. Select **Save & Close** or **Save & New** to create another task.

14. Once all tasks are loaded, click **Save**.

Now, the improvement plan is open and in progress.

Closing an Improvement Plan

1. Navigate to the **Suppliers** drop-down and select **Collaboration 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 click the **Set Completed** button to update the Status to completed.

5. The improvement plan is closed and marked as completed.

Resources

Click the link below for more information on creating and closing improvement plans in APP:

https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/supplier-management-qrgs