Goals

Become knowledgeable and familiar with Purchasing processes and resources.
Comply with University of Miami Purchasing Policies.

Purchase Order Process Overview

Academy/MSOM POs

Steps 6, 7, and 8 may occur interchangeably.

View the full details and resources.

Terminology

Business Associate Agreement (BAA) – For inbound POs, this additional Conga form is required when a supplier will have access to personal health information (PHI). (Conga > Business Associate Agreement form + Reference the purchase requisition number.)

Consultant Questionnaire – Required for all individual consultants with rare or highly specialized expertise TIP: Only required for individuals, not companies. Attach to the requisition. E.g.:

- Highly Specialized
  - DNA Sequencing
  - Poison Control
  - Astrophysics Mapping

- Not Highly Specialized
  - Equipment Repair Person
  - Party / Event Planners
  - IT / Business Operations

Inbound Goods/Services - UM is paying to bring in goods/services. E.g., UM is purchasing furniture or catering services

Non-Disclosure Agreement (NDA) – For inbound POs, an additional Conga form is required when UM and the supplier will exchange confidential information in support of a specific purposes. (Conga > Contract Administration, Business Services form + Reference the purchase requisition number.)

Outbound Services – UM is being paid to provide a service to a counterparty. E.g., UM is being paid by another University to have a UM professor lecture at a symposium.

Payment Matrix – A list of commodities and their allowed UM payment process(es). Some examples and exceptions may also appear.

Purchase Order (PO) – A UM authorized purchase that is sent to the supplier to provide goods and / or render services.

Purchase Requisition (req) – A request to purchase goods or services using UM funding through Workday.
Purchasing 101 Resource Guide
Due to frequent changes, please refrain from printing this guide.

Workday | Conga | Purchasing Help Desk | Policy Stat
PO Process Overview | Terminology | Contacts | ULearn Classes

### Purchasing Department Contacts
- Purchasing Help Desk
- Training Team
- Purchasing Buyers
- PCard & TCard
- Sourcing Team
- Data Team

### Non-Purchasing Department Contacts
- Accounts Payable
- Disbursements
- Contract Matrix
- UHealth Procurement (Supply Chain Services)
- UMIT Demand Pre-Approvals
- UM Communications Pre-Approvals

### ULearn Classes Hosted by the Purchasing Department
- Purchasing 101 Webinar
- Purchasing from Diverse Suppliers
- Supplier Onboarding for Purchase Orders
- Purchasing Department Contracts