Purchase Orders 101 Resource Guide

Due to frequent changes, please refrain from printing this Academy/MSOM guide to purchasing.

Workday | Conga | Academy/MSOM Help Desk | Policy Stat
PO Process Overview | Terminology | Contacts

Goals

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

Purchase Order Process Overview

Academy/MSOM Purchase Orders
View the full details and resources.

1. Payment Matrix
2. Supplier Onboarding
3. Purchase Requisition or “Req”
4. Contract Request Form
5. Purchase Order or “PO”
6. Goods Provided/Services Rendered
7. Invoicing
8. Change Order
9. Close Purchase Order

Pre-Approvals

Attach email approval to the purchase requisition.

- **Alcohol** - Risk Management
- **Communications** - Logos, advertising, branding, photographers, social media, websites – UM Communications
- **Database Rights and Inventions** – Office of Technology Transfer
- **Exports** – Export Control
- **Furniture/Furnishings:**
  - CG/RSMAES – Rosina Villavicencio and Maggie Binimelis
  - Medical – Amy Kelly
- **RFPs** – Purchasing Department
- **Software/Hardware** (that will run on UM servers)
  - Academy - Julie Potter
  - MSOM – Nilda Labrador

Supply Chain

Academy/MSOM Training Help Desk
UHealth Training Help Desk
Procurement Buyers
PCard & TCard
Sourcing Team
Data Team

Non-Supply Chain

Accounts Payable
Disbursements
Contract Matrix
Risk Management
Jaggaer.com (Supplier’s Profile)
UMIT Demand Pre-Approvals
UM Communications Pre-Approvals
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**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.