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.

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.
Pre-Approvals

Attach email approval to the purchase requisition.

- UM Communications – Logos, advertising, photographers, social media, websites
- Purchasing - RFPs
- UMIT Academy or UMIT MSOM – Computer software and hardware outside of the Dell and Apple UMarketplace catalogs
- Interior Design Gables or Interior Design Medical – Furniture and furnishings
- Office of Technology Transfer - Inventions and database rights
- Export Control – Exporting goods
- Risk Management: Alcohol

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

Non-Purchasing Department
- Accounts Payable
- Disbursements
- Contract Matrix
- UHealth Procurement (Supply Chain Services)

ULearn Classes Hosted by the Purchasing Department
- Purchasing 101 Webinar
- Purchasing from Diverse Suppliers
- Supplier Onboarding Drop-In Lab Purchase Orders
- Purchasing Department Contracts