Congratulations on building up your Purchasing skill set! You have learned a lot about the Purchasing process and related tasks. We look forward to seeing you at our next Purchasing event!

Goals

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

Purchasing Process Overview

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

Checklist

1. **Is a Purchase Order required to pay the supplier?** If UM is paying to receive a good/service view the [Payment Matrix](#), to confirm a PO is required. E.g., Professional memberships can be paid by PO, PCard, eCheck, or reimbursement.

2. **Is the Supplier Onboarded?**
   - [Search for a Supplier](#) in UMarketplace
   - If the supplier does not appear or is not active, find an alternate active supplier.
     - Diverse Active Suppliers
     - [Purchasing Buyer](#) Supplier Recommendations
   - If an alternate supplier cannot be used, complete a [New Supplier Request form](#) to onboard the supplier.

3. **Has a purchase requisition been created with all supporting documentation?**
   A purchase requisition (Req) is a request to purchase goods and/or services. If fully approved, the requisition will close, and a purchase order (PO) will be issued.
   - [Non-Catalog Requisitions](#)
   - [Catalog Requisitions](#)
   - [Frequently Used Spend Categories](#)
   - [Viewing a Requisition’s Status](#)
   - [Editing a Requisition](#)

   **Pre-approvals:**
   - UMIT Governance Approvals – Required for hardware, software, or personal devices that run on UM Servers [UMIT Demand Requirements/Process](#), attach to the requisition or Internal Comments field, note the date UMIT was contacted for approval. When approved, forward approval to the Purchasing Buyer.
   - UM Communications Approvals - Angie Villanueva:
     - UM Logos – Attach a mock-up or proof to the requisition. (E.g., printing, branding, signage)
     - Websites & Social Media - Obtain approval from UM Communications.
Purchasing 101 Resource Guide

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Workday | Policy Stat
Goals | Purchasing Process Overview | Terminology | Contacts | ULearn Classes

Pre-approvals (continued):
• For RFPs, Bids, and University-Wide Contracts, reach out to Ignacio Calle.

Additional Supporting Documents:
• **Service Agreements (Important):** Since the launch of Conga, this attachment is no longer required, unless specified by a Purchasing Buyer. Instead provide details and the scope of work in the requisition Description field. Then the agreement will be built in Conga.
• **Supplier’s Quote/Contract:** If the supplier has provided their contract, obtain a Word version, review, initial at the bottom, and attach to the requisition. **Important:** Never sign a quote/contract. UM Policy - Delegation of Contracting Approval and Signature Authority
• **Consultant Questionnaire** – Required for all individual consultants with rare or highly specialized expertise. **Important:** Only required for individuals, not companies. Attach to the requisition.
  - **Highly Specialized Examples:** DNA Sequencing, Poison Control, and Astrophysics Mapping.
  - **Not Highly Specialized Examples:** Equipment Repair, Party/Event Planners, IT/Business Operations
• **Grants requiring a Sole Source/Justification Form** – Attach to the requisition, 3 quotes or 1+ quote and a Sole Source Justification form
  - Federal Grants over $25K+
  - State Grants - $35K+
• **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.)
• **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.)

4. **Is a Conga Procurement Request Form required?** This is determined by the Purchasing Buyer and can be viewed in the Workday Process History, after the first Buyer’s approval. [PO Contract Tutorial](#), Start from page 2, section C Track Approvals.

5. **Has a PO been issued?** A Purchase Order is a document issued by the buyer to a seller. Internally, a PO signifies the department has received financial approval to make the purchase. The PO number can be found on the requisition line items. [Search for a PO Number](#), Start on page 3, section Searching for a PO Number Within a Requisition.

6. **Have the goods been delivered and/or services been rendered?** Contact the supplier with any questions or concerns.
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7. **Has the supplier sent the invoice(s) to the department or Accounts Payable?** Contact the supplier for invoices pending payment. Should the department receive an invoice, **Submit the invoice to Accounts Payable** for processing.

8. **Is a change order needed?** A change order can be initiated to increase the dollar amount or extend the end date for example. If the scope of work is new, or the supplier names needs to be changed, create a new requisition. Note, change orders can only be initiated by an employee with the Procurement Data Entry Specialist (PDES) or Cost Center Manager (CCM) security role. **Initiating Change Orders, Consulting Addendum**

9. **Have all invoices been paid by Accounts Payable, and all payments been sent to the supplier?** Contact the supplier for invoices pending payment. Contact Accounts Payable to confirm payment has been sent. If all pending and future invoices have been processed and payments have been sent, **close the PO**.

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**Terminology**

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

<table>
<thead>
<tr>
<th>Highly Specialized</th>
<th>Not Highly Specialized</th>
</tr>
</thead>
<tbody>
<tr>
<td>• DNA Sequencing</td>
<td>• Equipment Repair Person</td>
</tr>
<tr>
<td>• Poison Control</td>
<td>• Party / Event Planners</td>
</tr>
<tr>
<td>• Astrophysics Mapping</td>
<td>• IT / Business Operations</td>
</tr>
</tbody>
</table>

**Inbound** – UM is paying to bring in goods/services. E.g., UM is purchasing furniture or catering services

**Outbound** – 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 payment process(es). Some exceptions may appear.

**Purchase Order (PO)** – A fully approved purchase requisition that is sent to the supplier to be fulfilled for goods and/or services.

**Purchase Requisition (REQ)** – A request to purchase goods or services using UM funding through Workday.

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**Purchasing Contacts**

Purchasing Help Desk  
Purchasing Buyers  
PCard & TCard  
Sourcing Team  
Data Team

**Non-Purchasing Contacts**

Accounts Payable  
Disbursements  
UHealth Procurement  
Contract Administration

**ULearn Classes**

Purchasing 101 Webinar  
Purchasing from Diverse Suppliers  
Supplier Onboarding for Purchase Orders  
Purchasing Department Contracts

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Purchasing Help Desk  
purchasing.miami.edu