PO Contract Checklist
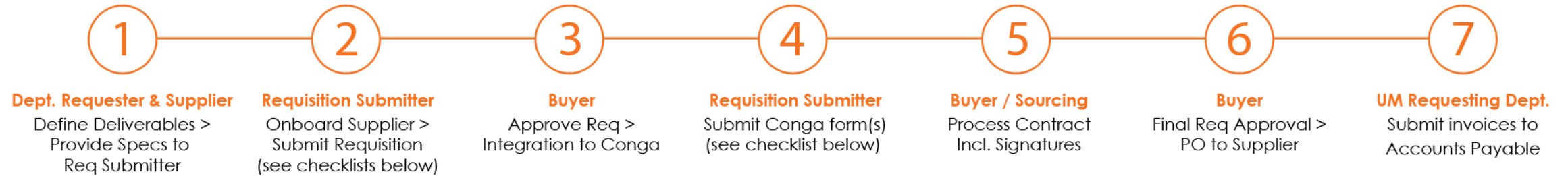
The Purchase Requisition submitter can use this guide to gather information for PO contracts.

(1)	(2)	(3)	(4)	(5)	(6)	(7)
Dept. Requester & Supplier	**Requisition Submitter**	**Buyer**	**Requisition Submitter**	**Buyer / Sourcing**	**Buyer**	**UM Requesting Dept.**
Define Deliverables > Provide Specs to Req Submitter	Onboard Supplier > Submit Requisition (see checklists below)	Approve Req > Integration to Conga	Submit Conga form(s) (see checklist below)	Process Contract Incl. Signatures	Final Req Approval > PO to Supplier	Submit invoices to Accounts Payable

Contents

Supplier Onboarding Fields

If the supplier is not currently in Workday as an *Active* supplier for Purchase Orders, submit a *New Supplier Request for Purchase Orders* form in Workday.
Important: Consider buying from alternative supplier that has already been onboarded. Depending on supplier cooperation, onboarding can take months or may not occur.
Walkthrough requests: Supply Chain Training   Workday

Information Providers

Supplier	Department Requestor
• Company Name • Company profile submitter's name, email, and phone number **Important:** Incorrect contacts can unknowingly delay onboarding. • Is this for the purchase of medical/surgical supplies? (Y/N) • Is a contract/agreement needed? (Y/N) • Has anyone at the requested company been an employee of the University of Miami in the last 12 months? (Y/N) • Is this vendor owned directly or indirectly by a UM physician or immediate family member of a UM physician? (Y/N) • Has this supplier been paid with a Corporate Card in the past? (Y/N)	Business Purpose: E.g. Information will be sent to the supplier to provide analytics for Otolaryngology non-clinical research.

Purchase Requisition Fields

Gather the information below. Then complete the Workday Purchase Requisition form.
Walkthrough requests: Supply Chain Training   Workday

Information Providers

Requisition Submitter	Supplier (Agreement) / Departmental Requestor	Supply Chain Supply Chain Buyer or Sourcing
UM Company: Important: This is determined by the Worktag. • 200 Academy • 305 UHCORP • 310 UMMG • 320 ABLEH • 330 UMHC • 340 UMH • 500 MSOM	**UM Company:** Important: This is determined by the Worktag. • 200 Academy • 305 UHCORP • 310 UMMG • 320 ABLEH • 330 UMHC • 340 UMH • 500 MSOM	
Requisition Type: • Goods • Service Contract/Quote • Sub Award/Subcontract • Consulting Agreement • Goods Contract • Software License		**Requisition Type:** • Goods • Service Contract/Quote • Sub Award/Subcontract • Consulting Agreement • Goods Contract • Software License
Distribution: *Deliver-To:* Building Name + Room # *Ship-To:* Physical Address + Room #	**Distribution:** *Deliver-To:* Building Name + Room # *Ship-To:* Physical Address + Room #	
Worktag: • Program (PG#####) • Grant (GR#####) • Gift (BG#####) • Project (PR#####)	**Worktag:** • Program (PG#####) • Grant (GR#####) • Gift (BG#####) • Project (PR#####)	
	Item Description: • Scope of Work • Deliverables	
Spend Category (SC0####)		**Spend Category** (SC0####)

Information Providers		
Requisition Submitter	Supplier (Agreement) / Departmental Requestor	Supply Chain Supply Chain Buyer or Sourcing
	Start Date **End Date**	
	Supplier's Name	
	Dollar/Extended Amount	
Internal Memo: • Previous PO/ Contract # • (Sourcing/Buyer Name) will process this contract.	**Internal Memo:** • Payment Terms: Deposit, Monthly/annual payments	**Internal Memo:** • (Sourcing/Buyer Name) will process this contract.
Attachments: • Supplier's Quote/ Agreement Template • Internal UM docs/emails	**Attachments:** • Supplier's Quote/ Agreement Template • Internal UM docs/emails	**Attachments:** • BAA • Consultant Questionnaire • Internal UM docs/emails
Requisition Number This will appear after selecting *Save for Later* or *Submit*. E.g., RQ-0000######		
Approving Buyer's Name This will appear after all other approvals E.g., Carlos Fayad		

From the *Process History*, does the *Conga Integration* step appear with a status of *Completed*?
This will appear after the Buyer's first approval.
• If yes, reach out to the Buyer/Sourcing to determine which Conga form should be completed.
• If no, no action is needed unless the Buyer/Sourcing specifically reaches out with a request.
		Required Conga form(s):
		• **BAA** E.g., *#3 Business Associate Agreement*
		• **Integrated *Draft***
		  E.g., Conga *Request 000#####-##*
		• **Non-Integrated Blank Purchasing Form**
		  E.g., New Request *#1 Purchasing…*

Conga Contract Request Fields
Gather the information below, then complete the Conga request form(s).
Walkthrough requests: Supply Chain Training Conga

Information Providers

Requisition Submitter	Supplier (Agreement) / Departmental Requestor	Supply Chain Supply Chain Buyer or Sourcing
Contract Requestor's Name		**Contract Owner's Name**
Contract Purpose: • RQ-0000#### • SOW/Deliverables • Who, what, when, why, where	**Contract Purpose:** • SOW/Deliverables • Who, what, when, why, where	
Agreement Type: • Standalone • Master • Amendment • RFP		**Agreement Type:** • Standalone • Master • Amendment • RFP
Contract Type: Purchase Agreement + • Goods • Goods and Services • Services • Public Health Trust/Jackson		
Contract Value $ amount over lifespan of the contract	**Contract Value** $ amount over lifespan of the contract	
	International Information: • Will the vendor be providing any data or processing any date related to individuals located in the European Union? • Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement, and do the activities under the agreement involve any data pertaining to individuals located in the European Union?	

Information Providers

Requisition Submitter	Supplier (Agreement) / Departmental Requestor	Supply Chain Supply Chain Buyer or Sourcing
Proposed Expiration Date E.g., "2-year contract"	**Proposed Expiration Date** E.g., "2-year contract"	
	Counterparty Contact Information: (Supplier Rep.) • Name: • Email: • Phone Number:	
University Division: E.g., MSOM/UHealth, College of A&S		
Department Name		
Which Workday Company is this request for? This must match the Workday purchase requisition.		
	Security and Privacy Information • Will Counterparty have access to or be exposed to protected health information or personally identifiable information? • Will individually identifiable patient information be shared or accessed? • Will the vendor be storing, processing, transmitting, credit card holder data, or be providing services that control or could impact the security of cardholder data?	
Additional Relevant Information: • Previous PO # (when applicable) • Current BAA# (when applicable)		
Attachments/Supporting Documents, E.g.: • Agreement / Quote • Emails • Mockup • Supplier Agreement		**Attachments/Supporting Documents**, E.g.: • Consultant Questionnaire • Contract Addendum • Unauthorized Purchase Form • UM preapprovals (logos, exports, alcohol, etc.)
Conga Request # (e.g. 000#####-##)		
Track the Status in Conga.		
Report changes to the Buyer /Sourcing.		