

Purchase Order Process Overview

Academy & Miller School of Medicine POs
Steps 6, 7, and 8 may occur interchangeably.



1. **Payment Matrix** – The University has multiple processes for ordering goods and services that are paid with UM funds. View the Payment Matrix to ensure a purchase order (PO) is an allowed process for the commodity being purchased.

Examples:

- Contracts = Purchase Order (PO)
- Honorariums (non-consulting) = Check Request
- Professional Memberships = PO, PCard, Check Request, or Reimbursement
- Recurring Cellular Charges = PCard
- Faculty and Staff Airfare = Travel Card and/or Reimbursement

Tip - If a supplier is active in Workday for POs, the PO process will take precedence over PCards, Check Requests, Travel Cards, and Reimbursements.

Guides:

- UM is Obtaining Goods/Services- [Payment Matrix](#)
- UM is Providing Services – [Contract Matrix](#)

Assistance

- **POs**
 - **for Academic / Research** – [Purchasing Help Desk](#)
 - **for UHealth** – [Supply Chain Services Help Desk](#)
- **Corporate Cards**
 - [PCard Customer Service](#)
 - [Travel Card Customer Service](#)
- [Check Requests](#)
- [Reimbursements](#) / [Expense Reports](#)

2. **Supplier Onboarding** – Before requesting to purchase goods and / or services, check UMarketplace to see if the supplier has been onboarded for purchase orders and if their status appears as *Active*. If the supplier is not *Active* or does not appear in UMarketplace, look for an alternate supplier or reach out to the Purchasing Buyers for recommendations. As a last resort, onboard the supplier.

Example: Compass Group USA, Inc.

- Doing Business As (DBA) “Chartwells”
- Supplier ID# begins with “p,” not “sup” = p15451009
- UMarketplace Status = *Active*

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Tips:

- A supplier may appear in Workday while Inactive or only available for Check Requests. Therefore, a requisition cannot be submitted.
- Supplier onboarding can be time consuming for suppliers, and some suppliers may refuse. Using an alternate Active supplier for time sensitive orders can avoid last minute stress.

Guides & Assistance:

- [Search for an Active supplier](#) in UMarketplace ([Purchasing Help Desk](#))
- Search for an Active [Diverse Supplier](#) ([Purchasing Help Desk](#))
- Find supplier recommendations ([Purchasing Buyers](#))
- Onboard a new or inactive supplier by submitting a [New Supplier Request](#) ([Purchasing Help Desk](#))
- Provide the supplier with the [Registration Steps](#)
- Supplier is needs assistance logging into Jaggaer and / or uploading their information ([Jaggaer Customer Support](#))

- 3. Purchase Requisition** - To purchase goods and services with UM funds, create and submit a purchase requisition (req) in Workday. After all financial and procedural approvals are obtained, the req will close. Then a purchase order (PO) will be issued and sent to the supplier for fulfillment.

Example:

- RQ-0000#####
- Status = *Draft/InProgress/Closed/Denied/Cancelled*

Guides and Tips:

Before creating a req, gather information and documents.

- **Financial Data** – Contact your Cost Center Manager (CCM) or Principal Investigator (PI) to obtain the following information:
 - [Spend Category](#) (E.g., Sc08218 – Clerical Supplies or SC08255 – Technical Supplies, Lab Related)
 - Both the Driver Worktag (E.g., Program Number PG00#### or Grant Number GR00####) and the corresponding UM Company Number (E.g., 200 Academy or 500 MSOM)
- **Supporting Documentation** – Attach supporting documents to the requisition as required by the [Purchasing Buyer](#).
 - **Quotes** – For non-catalog reqs, obtain a current quote from the supplier.
 - Internet pricing is not recommended due to frequent price changes and loss of potential UM discounts.

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- Discounts may appear at the bottom of a quote and should be applied to the line item(s).
- Shipping and freight do not need to be included as a line item. Instead note the item and price in the Description field of the first line item. Departments that prefer to obtain financial approval prior to purchasing may include these as line items.
- **Consultant Questionnaire** - This form is only required when buying from individuals, not companies that provide highly specialized services.
 - Highly Specialized Examples: DNA sequencing, poison control, and astrophysics mapping.
 - Non-Highly Specialized Examples: equipment repair, party/event planners, and IT/business operations
- **Pre-Approvals** - Before the Buyer can issue a PO, some pre-approvals may be required
 - UMIT Governance - Hardware, software, or personal devices that run on UM servers require approval through the [UMIT Demand process](#).
 - **UM Communications** - Items containing UM logos, or services related to websites and social media require approval from [Angie Villanueva](#).
 - For RFPs, bids, and University-wide contracts, contact [Ignacio Calle](#).
- **Grants** – Federal grant orders over \$25,000 and state grant orders over \$35,000 require the requisition creator to attach three quotes and/or a [Sole Source Justification](#) form.
- **Contracts / Service Agreements** - Due to the complex nature of contracts, allow two months or more for processing. For specific contract instructions, view the full [PO Contract Resource Guide](#). For example, in the *Description* field, include pricing from the supplier, a detailed scope of work, any work and payment schedules such as deposits.) **Contract Requisition Tips:**
 - **Description Field** = Scope of work + who, what, when, where, and why
 - **Attachments:**
 - **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 provided a quote. Attach this to the requisition.

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- If the supplier 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](#)

Guides for Creating a Requisition

- [Catalog Reqs](#), E.g., Staples, VWR, Print Farm for UM stationary, [Canteen](#) for coffee and related supplies, [Dell](#), [Amazon](#), and more
- [Non Catalog Reqs](#): E.g., [Dry ice](#), [cellular services](#), [Compass Group](#) for catering, consulting services, [standing orders](#), and more
- **Related Tutorials:**
 - [Edit a Req](#)
 - [Edit Default Addresses Worktags](#)
 - View the Req [Status](#)
 - [Cancel](#) a Req
 - [Approve](#) a Req,
 - [Company 500](#) Reqs
- **Specialized Guides:**
 - [Change Orders](#)
 - [Changing a Goods Line to a Services Line](#)
 - [Standing Orders, Company 500 Orders](#)
 - [Homepage App Configuration](#)
- **Assistance** - PurchasingHelpDesk@miami.edu

4. **Contract Request Form** – During the requisition (req) approval process, a Purchasing Buyer will determine if a contract is required. If so, this can be viewed in the Workday Process History, after the first Buyer's approval. They may request additional information or ask the req creator to login to [Conga](#) and edit a pre-drafted Conga Contract Request form.
 - **Examples:** JENN-STA-0000##### or REAL-MAS-0000#####
 - **Tip** – For Purchase Orders (POs), end users should not request a new *Workday-Conga Initiated Request* form. Instead, find and edit the Conga Draft. This will automatically generate after the first Buyer's approval. It will contain some req information and all the attachments from Workday.
 - **Guide** - [Purchasing Department Contracts](#),
 - **Assistance** - [Purchasing Help Desk](#)

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5. **Purchase Order** - Once a purchase requisition (req) is completely approved, the status will change to *Closed*. Then a purchase order (PO) will be issued and sent to the supplier by either Workday or the Purchasing Buyer.
 - **Example:**
 - PO-0000#### and Status = *Successfully Completed, Issued, Closed, or Cancelled*
 - Also, the corresponding req Status will be *Closed*. (E.g., RQ-0000#####)
 - **Guides & Assistance:**
 - [Searching for a PO Number \(Purchasing Help Desk\)](#)
 - [Printing a PO \(Purchasing Help Desk\)](#)
6. **Goods Provided / Services Rendered** - The supplier will deliver the goods or services.
 - **Example** – PO-0000#####, Status = *Successfully Completed/Issued*
 - **Guide** – [Finding a PO Number](#)
 - **Assistance** – Contact the supplier's rep/customer svc + provide the [PO Number](#)
7. **Invoicing** – The purchase order (PO) directs suppliers to send invoices to UM Accounts Payable (AP). Should the invoice be sent to the department, submit the invoice to AP to begin the payment process.
 - **Example** – PO-0000#####, Invoice Status: *Partially Paid, Fully Paid*
 - **Guide** – [Accounts Payable Invoice Submissions](#)
 - **Assistance** – [Accounts Payable Contacts](#)
8. **Change Orders** – To edit fields on a purchase order (PO), an employee with the security role *Cost Center Manager (CCM)* or *Procurement Data Entry Specialist (PDES)* can initiate a change order.
 - **Example**
 - PO-0000####, Version 1
 - Increase line 1 to \$500
 - Extend the end date to 5/31/24
 - **Tips:**
 - For POs containing expired grants, close the original PO and create a new requisition.
 - To change the supplier's name, add goods to be delivered again, or add a new scope of work, submit a new purchase requisition. Then close the original PO.
 - To edit an existing contract, start by initiating a change order and attach an Addendum to the change order.
 - To change a worktag that has already been invoiced, submit an Accounting Journal.

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- **Guides, Forms, and Assistance:**

- [Change Order](#) ([Purchasing Help Desk](#))
- [Finding a PO number](#) ([Purchasing Help Desk](#))
- [Changing a Line Item from Goods to Services](#) ([Purchasing Help Desk](#))
- [Addendum form](#) ([Purchasing Help Desk](#))
- Update an employee's [Finance Security Role](#) (help@miami.edu)
- Accounting Journals ([Workday Training Catalog](#))

9. Close a Purchase Order – If all items have been received, and all invoices have been processed and paid, the purchase order (PO) can be closed. This moves encumbered funds that will not be used back into the budget and keeps the budget updated for fiscal year end preparations. Employees with the security role *Procurement Data Entry Specialist* (PDES) and *Cost Center Manager* (CCM) can close a PO.

- **Examples:**

- All items from a PO have been received. Accounts Payable has confirmed all payments have been sent. There are no open encumbrances on the PO and the status is *Successfully Completed* or *Issued*. The PO should be closed in preparation for fiscal year end.
- A PO has an open encumbrance for an item that was on back order and is no longer needed. All invoices have been processed and paid.
- A standing order was created and has excess funds. All invoices have been processed and paid.
- **Tip** - Closing a PO before all invoices are paid, will require the department to submit a new requisition before payment can be made.
- **Guides & Assistance** – [PO Close](#)
 - Have all payment been received? (Contact the supplier.)
 - Was a specific invoice received? ([Accounts Payable](#))
 - Was payment sent? ([Accounts Payable](#))
 - [Closing a PO](#) ([Purchasing Help Desk](#))

ULearn Classes Hosted by the Purchasing Department

[Purchasing 101 Webinar](#)
[Purchasing from Diverse Suppliers](#)
[Supplier Onboarding for Purchase Orders](#)
[Purchasing Department Contracts](#)