Purchase Order Process Overview

Use this as a general purchase order guide for Academy & Miller School of Medicine.

1. **Payment Matrix** – The University has various ordering and payment processes. To ensure a Purchase Order is needed before beginning the process, view the Payment Matrix.
   - **Examples:**
     - Contracts = Purchase Order
     - Honorariums (non-consulting) = Check Request
     - Recurring Cellular Charges = PCard
     - Faculty and Staff Airfare = Travel Card and/or Reimbursement
   - **Guide** UM is Obtaining Goods/Services - Payment Matrix
   - **Guide** UM is Providing Services - Contract Matrix
   - **Assistance** UM is Obtaining Goods/Services - PurchasingHelpDesk@miami.edu

2. **Supplier Onboarding** – Before onboarding a new supplier, consider purchasing from an alternate supplier that is already onboarded and Active. This can save time in the overall process. View the list of diverse suppliers, search for a current Active supplier, or reach out to the Purchasing Buyer that handles the commodity for recommendations.
   - **Examples:**
     - Active Supplier = Compass Group USA, Inc., Doing Business as “Chartwells” Supplier ID# = p15451009
     - Active Diverse Suppliers
     - Active Suppliers
     - Contact a Purchasing Buyer for Active supplier recommendations
   - **Guides:** Supplier Onboarding, Registration Steps for the Supplier
   - **Assistance** - PurchasingHelpDesk@miami.edu

3. **Purchase Requisition** - To purchase goods and/or services and obtain financial approval(s), initiate a Workday Purchase Requisition.
   - **Example** – RQ-0000############, Status = Draft/InProgress/Closed/Denied/Cancelled
   - **Guides for Basic Processes:** Non-Catalog Goods, Non-Catalog Services, Catalog Goods, Searching, Status, Editing Addresses, General Editing, Cancelling, Approving, Closing, Printing
   - **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** – For requisitions tied to a contract, the requisition creator may be requested to complete a Workday-Initiated Contract Request form.
   - **Examples:** JENN-STA-0000##### or REAL-MAS-0000#####
   - **Guide** - Purchasing Department Contracts
   - **Assistance** - PurchasingHelpDesk@miami.edu

For full Purchase Requisition training log into **Ulearn** and register for the **Purchasing 101 Webinar**.
5. **Purchase Order** - Once a purchase requisition is completely approved, the status will change to Closed. Then a purchase order will be issued and sent to the supplier by either Workday or the Purchasing Buyer.
   - **Example** – RQ-0000########, Status = Closed
     PO-0000########, Status = Successfully Completed/Issued/Closed/Cancelled
   - **Guide** – Finding a Requisition Number
   - **Assistance** – PurchasingHelpDesk@miami.edu

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#

7. **Invoicing and Change Orders** may occur interchangeably. For example, a change order may be needed before, during, or after invoicing.
   - **Invoicing** – On the PO, suppliers are asked to send invoices directly to Accounts Payable. Should an invoice be sent to the department, it is important to submit the invoice to Accounts Payable to begin processing the payment.
     - **Example** – PO-0000########, Invoice Status: Partially Paid, Fully Paid
     - **Guide** – Accounts Payable Invoice Submissions
     - **Assistance** – Accounts Payable Contacts

8. **Invoicing and Change Orders** may occur interchangeably. For example, a change order may be needed before, during, or after invoicing.
   - **Change Orders** – To edit fields on a PO, initiate a change order. Only employees with the security role Procurement Data Entry Specialist (“PDES”) and Cost Center Manager (“CCM”) have access to initiate a change order for their designated Cost Center(s).
     - **Example** – Increase the Dollar Amount + change the End Date of PO-0000########, Status = Change Order In Progress
     - **Exceptions**
       - Create a new requisition:
         - To change the Supplier Name or UM Company Name
         - Goods – Additional goods needed
         - Services – New scope of work
         - Grants – An expired grant appears on any line item
     - **Guide** – Change Orders
     - **Assistance with Security Roles (PDES Role)** – Help@miami.edu
     - **Assistance Initiating a Change Order** – PurchasingHelpDesk@miami.edu
     - **Assistance with Accounting Journals** – Workday Training Catalog
9. **Close a Purchase Order** – Most POs will not automatically close. To unencumber excess money on a PO, and to ensure the PO is not over invoiced, close the PO. This will place any remaining money back into the budget and to keep financial reporting accurate. This can be especially helpful during fiscal year end. Once all invoices are paid and the payment has been sent, the department can close the PO. Employees with the security role *Procurement Data Entry Specialist* (“PDES”) and *Cost Center Manager* (“CCM”) have access to close POs for their Cost Centers.

- **Examples:**
  - 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.

- **Guide** – [PO Close](#)
- **Assistance with Security Roles (PDES Role)** – [Help@miami.edu](mailto:Help@miami.edu)
- **Assistance Closing a PO** – [PurchasingHelpDesk@miami.edu](mailto:PurchasingHelpDesk@miami.edu)

For questions, contact [PurchasingHelpDesk@miami.edu](mailto:PurchasingHelpDesk@miami.edu).