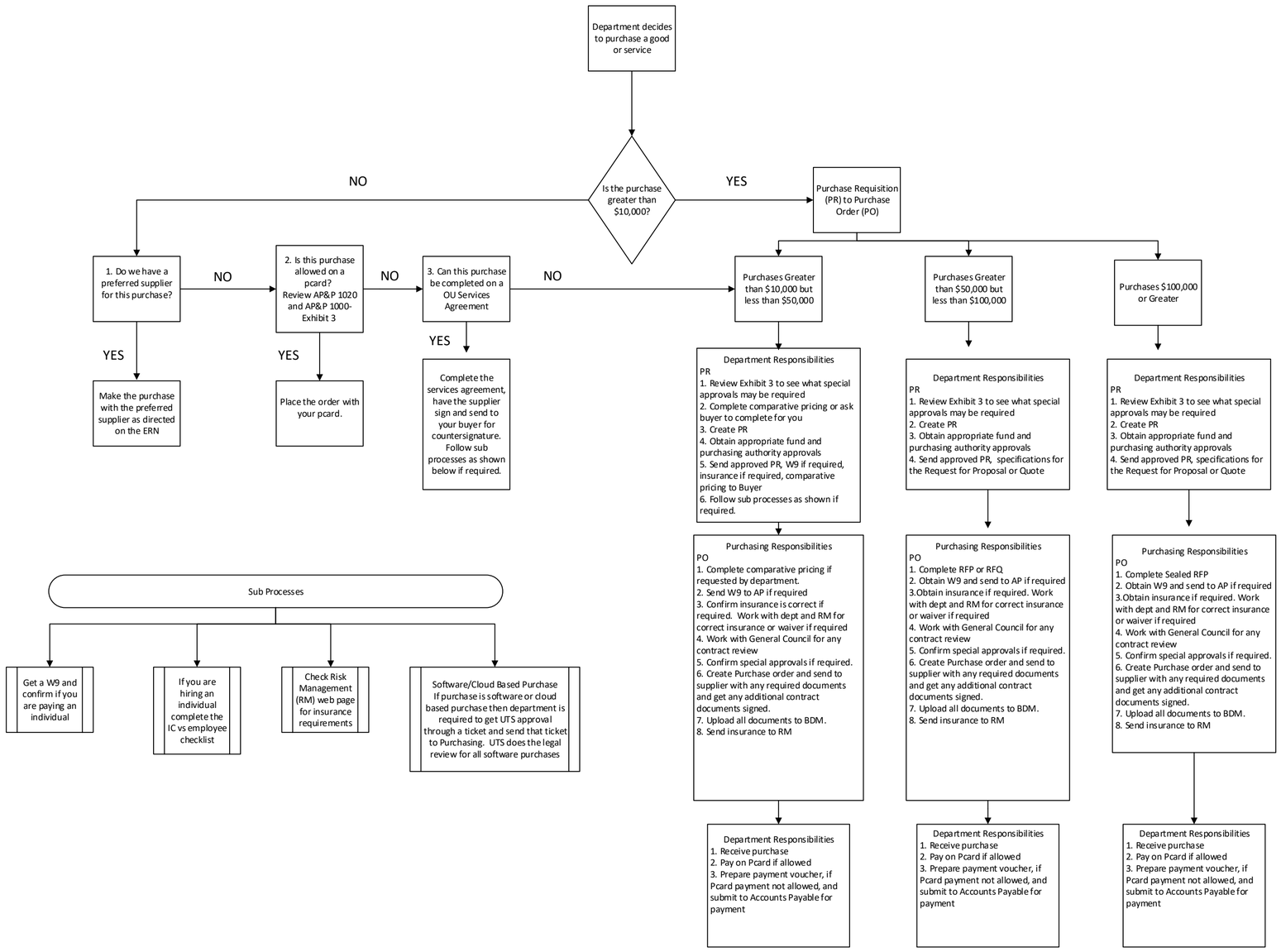
Department decides to purchase a good or service
Is the purchase greater than $10,000?
NO
YES
Purchase Requisition (PR) to Purchase Order (PO)
1. Do we have a preferred supplier for this purchase?
NO
2. Is this purchase allowed on a pcard? Review AP&P 1020 and AP&P 1000-Exhibit 3
NO
3. Can this purchase be completed on a OU Services Agreement
NO
YES
Make the purchase with the preferred supplier as directed on the ERN
YES
Place the order with your pcard.
YES
Complete the services agreement, have the supplier sign and send to your buyer for countersignature. Follow sub processes as shown below if required.
Purchases Greater than $10,000 but less than $50,000
Purchases Greater than $50,000 but less than $100,000
Purchases $100,000 or Greater
Department Responsibilities
PR
1. Review Exhibit 3 to see what special approvals may be required
2. Complete comparative pricing or ask buyer to complete for you
3. Create PR
4. Obtain appropriate fund and purchasing authority approvals
5. Send approved PR, W9 if required, insurance if required, comparative pricing to Buyer
6. Follow sub processes as shown if required.
Department Responsibilities
PR
1. Review Exhibit 3 to see what special approvals may be required
2. Create PR
3. Obtain appropriate fund and purchasing authority approvals
4. Send approved PR, specifications for the Request for Proposal or Quote
Department Responsibilities
PR
1. Review Exhibit 3 to see what special approvals may be required
2. Create PR
3. Obtain appropriate fund and purchasing authority approvals
4. Send approved PR, specifications for the Request for Proposal or Quote
Purchasing Responsibilities
PO
1. Complete comparative pricing if requested by department.
2. Send W9 to AP if required
3. Confirm insurance is correct if required. Work with dept and RM for correct insurance or waiver if required
4. Work with General Council for any contract review
5. Confirm special approvals if required.
6. Create Purchase order and send to supplier with any required documents and get any additional contract documents signed.
7. Upload all documents to BDM.
8. Send insurance to RM
Purchasing Responsibilities
PO
1. Complete RFP or RFQ.
2. Obtain W9 and send to AP if required
3.Obtain insurance if required. Work with dept and RM for correct insurance or waiver if required
4. Work with General Council for any contract review
5. Confirm special approvals if required.
6. Create Purchase order and send to supplier with any required documents and get any additional contract documents signed.
7. Upload all documents to BDM.
8. Send insurance to RM
Purchasing Responsibilities
PO
1. Complete Sealed RFP
2. Obtain W9 and send to AP if required
3.Obtain insurance if required. Work with dept and RM for correct insurance or waiver if required
4. Work with General Council for any contract review
5. Confirm special approvals if required.
6. Create Purchase order and send to supplier with any required documents and get any additional contract documents signed.
7. Upload all documents to BDM.
8. Send insurance to RM
Department Responsibilities
1. Receive purchase
2. Pay on Pcard if allowed
3. Prepare payment voucher, if Pcard payment not allowed, and submit to Accounts Payable for payment
Department Responsibilities
1. Receive purchase
2. Pay on Pcard if allowed
3. Prepare payment voucher, if Pcard payment not allowed, and submit to Accounts Payable for payment
Department Responsibilities
1. Receive purchase
2. Pay on Pcard if allowed
3. Prepare payment voucher, if Pcard payment not allowed, and submit to Accounts Payable for payment
Sub Processes
Get a W9 and confirm if you are paying an individual
If you are hiring an individual complete the IC vs employee checklist
Check Risk Management (RM) web page for insurance requirements
Software/Cloud Based Purchase
If purchase is software or cloud based purchase then department is required to get UTS approval through a ticket and send that ticket to Purchasing. UTS does the legal review for all software purchases