Please note: This user guide is intended for online use, and has a number of embedded links. Printing of these documents is discouraged, as they are updated frequently and consume paper resources when printed.

For questions about requisition or purchase order information in this user guide, please email Purchasing Services.

For questions about invoices or payment information, please email the Disbursement Center.

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The Requisitions function in PeopleSoft enables employees and procurement professionals to manage the purchasing of goods and services for the University. Information about vendors, payments, billing and budgets is maintained in this module.

Requisitions are used to order goods and services. Requisitions are entered into PeopleSoft in advance of a purchase by authorized individuals. Purchasing Services creates a purchase order based on the requisition. The purchase order is sent to the vendor as an authorized university order, with a copy forwarded to the requester.

A requisition creates a pre-encumbrance against the chartstring provided, reducing the overall available budget balance. Creation of the purchase order clears the pre-encumbrance and creates an encumbrance; the budget balance remains the same. Payment of the invoice clears the encumbrance and creates an expense.

Creating a Requisition

Create a Requisition

1. Log in to PeopleSoft Financials (www.uvm.edu/~erp/portal)

2. Navigation: Main Menu > eProcurement > Create Requisition

3. On the Define Requisition tab, verify the Business Unit is UVM01, the Requester name is listed and the Currency is USD. If it is not, enter a Footprint for assistance getting your default data set up to enter requisitions.

4. In the Requisition Name field, enter a meaningful name for the requisition. This will make searching for the requisition easier in the future. Click the Continue button.
Click the **Special Request** tab and Click the **Special Item** link.

5. Enter specific item or service information in the **Item Description** field (e.g., Item # 12345 Large Oval Wooden Conference Table). Requisitions with insufficient descriptions will be returned to the requester for revisions, (e.g., only vendor’s name entered, miscellaneous supplies, requisition #, etc.).

6. Enter the price of the item in the **Price** field (e.g., 123.50).

7. Enter the number of units to order in the **Quantity** field.

8. Enter the unit of measure in the **Unit of Measure** field, or click on the search icon to find the unit. If the requested item’s unit of measure is not listed, use **each (EA)**.

   Most commonly used units of measure:
   - BOX – Box
   - CS – Case
   - EA - Each
   - LOT – Batch Lot
   - MO – Month
   - PAK – Pak
   - SET – Set
   - UNT – Units
9. Click the Category field search icon.

10. Beginning in FY18, there is an improved category code list in PeopleSoft. Many codes have been inactivated, clearer descriptions are provided, and most importantly, the “Account Number” is available in the description field for easier searching. On the Look-Up Category page, Select search by Description in the dropdown menu and enter account number or key words. Click the Description label at the top of the column to sort the list for easier viewing.

*Please note:* Beginning FY18, the Category Tree/Category Folders are no longer a means for searching categories.
11. Click on the category to select it for use in your requisition.

12. Verify that the correct category is now in the item page.

13. Click the search icon to the right of the Vendor ID field.

14. Enter the desired Search parameters in the Vendor Search screen. Click the Find button. The more characters entered, the more refined the search. Searching by Name produces results that contain the name entered.
15. Select the appropriate vendor by clicking the blue **Vendor ID** link.

16. Verify that the selected vendor’s name and id are now in the appropriate fields of the **Special Item** section.

17. If the desired vendor is not found, click the **Suggest New Vendor** link. Enter the required information about the new vendor and click **OK**.

![Create Requisition](image)

**Note:** A field with an asterisk (*) is a **required** field and must be completed.
18. Attach a New Vendor W-9 form or IRS W-9 form to the requisition (as described in Step 24 below). New vendor requests will be reviewed and processed along with the Requisition.

19. The **Due Date** field is *not* used by Purchasing Services and is not required. Requisitions are processed on a first come, first served basis.

20. The **Blanket PO Dates** field is used with Blanket Purchase Orders. See page 16 for instructions specific to Blanket PO creation.

21. When the necessary information has been entered, click the **Add Item** button to place this item on the requisition.
Note: The Requisition Summary on the right side of the screen displays a high-level running total of the items entered on the requisition.

Repeat steps 8 through 21 to add more items if needed. Many items can be included, but **ONLY ONE VENDOR** can be used in each requisition.
22. Click the **Review and Submit** tab.

23. To include comments for the vendor or Purchasing Services, click the **Comments Bubble** to the right of the requisition line to open the **Line Comments** page.

![Requisition screenshot](image)

To have your comments print on the purchase order, check the box “Send to Vendor”.

![Line Comments screenshot](image)

24. Attach required documents to the requisition by clicking on the **Add Attachment** button.

Example of documents that may be required as attachments on requisitions are:
- Quotes, Estimates
- Contracts, Agreements, Terms & Conditions
- Quotation Evaluation Form or Single Sole Source Justification Form
- Employee vs. Independent Contractor Determination Form
- New Vendor W-9 Form or IRS W-9 Form
25. Browse for the file to attach, click the **Upload** button, then click **OK** to attach the file to the requisition. Multiple documents can be attached.
26. On the **Create Requisition** screen, on the **Review and Submit** tab, click the triangle-shaped **Expand Section** button to the left of the Requisition line.
27. Review the Ship To and change it if necessary. If the Ship To ID is not in the search list, add the address information in the comments field (See Step 23 for instructions on adding comments). **Please note: The Modify Onetime Address page should not be used for Ship To address changes.**

28. On Chartfields1 and Chartfields2 tabs, review the Chartfield values to which this will be charged (default values are displayed), and change if necessary. **Note: DO NOT change the value in the Account field.** The Account value is derived by the system, and is based on the Category selected in the item description. To change the Account, go back and change the Category code (See Step 10).

29. To split the item cost between multiple chartstrings, add a distribution line. Click the + sign to the far right distribution line 1 to create another line.

The expense can be split by Quantity or Amount/Percent. To change how the expenses are distributed, click the **Distribute By** dropdown and select Qty (Quantity) or Amt (Percent/Amount). Enter the Quantity values or Percent values accordingly. Update the values in the chartfields as needed.
30. When all items are added, click the **Save & submit** button on the bottom left of the screen.

31. On the **Confirmation** page, click the **Check Budget** button.
32. Verify that the **Budget Status** is valid. In the event of an error, click on the word **Error** to see a description of the budget error. Correct the error, and repeat the budget check process. If the error is not resolved, Purchasing Services cannot see or process the requisition.
Create a Blanket Requisition

Requesters can enter blanket purchase orders at the beginning of a new fiscal year into eProcurement on July 1 or later, or at any time during the fiscal year as needed. If you are paying a vendor multiple times in a fiscal year, a blanket order is required. Refer to Step 13c below for more details.

1. Log into PeopleSoft Financials (www.uvm.edu/~erp/portal)

2. Navigation: eProcurement > Create Requisition

3. On the Define Requisition tab, in the Requisition Name field, include the fiscal year along with any other naming convention. Click the Continue button.

4. Click the Special Request tab and Click the Special Item link.

5. Enter specific item or service information into the Item Description field (e.g., lab supplies, beakers, pipets, glassware, test tubes) or (snowplow/lawn care monthly services). Requisitions with insufficient descriptions will be returned to the requester for revisions, (e.g., only vendor’s name entered, miscellaneous supplies, requisition #, etc.).

6. In the Price field, enter a dollar amount estimate of the total spend through the blanket end date. If entering a blanket order based on a monthly charge or number of units, enter the monthly/unit amount in the Price field, e.g., 500.00, and the number of months in the Quantity field.
7. Enter the number of units to purchase in the **Quantity** field. If it is a blanket order by dollar amount, enter 1 as the quantity. If the blanket order is by month or number of units, enter the correct quantity for the remaining fiscal year, e.g., 12 months.

8. Enter the unit of measure in the **Unit of Measure** field, or click on the search icon to find the unit. If the requested item’s unit of measure is not listed, use **each (EA)**. Most commonly used units of measure:
   - BOX – Box
   - CS – Case
   - EA - Each
   - LOT – Batch Lot
   - MO – Month
   - PAK – Pak
   - SET – Set
   - UNT – Units

9. **For Category and Vendor ID Selection** – please refer to Steps 9-18 under “Create a Requisition” above.

10. Complete the **Blanket PO Dates** field for all blanket purchase orders. The start and end dates of the blanket purchase order must be entered in *exactly* the following format: **mm/dd/yy – mm/dd/yy**, (e.g., 07/01/17-06/30/18).

11. When the necessary information is in place, click the **Add Item** button to place this item on the requisition.

12. **For remaining Blanket Requisition Processing** – please refer to Steps 20-32 under “Create a Requisition” above.
13. Additional Notes for Blanket Requisitions:

a. Use your best estimate for total spend. **Hint**: use last fiscal year total spend amount as a starting amount. If you go over that amount, email Purchasing Services to increase PO# 123456 by $xx.xx amount to cover the remainder of the fiscal year.

b. If your requisition is connected to an RFP (Request for Proposal) and is a UVM contracted vendor, include the RFP# in the comments section. This means no documents are required to be attached to your requisition because Purchasing already has the documents on file for audit purposes.

c. Blanket Requisitions can be used for many different purposes to a vendor:
   i. Purchasing goods or services multiple times through the fiscal year
   ii. Purchasing goods or services on a monthly basis
   iii. Purchasing goods or services quarterly
   iv. Purchasing services from an individual 3 or more times during academic year
   v. Purchasing goods or services multiple times on different chartstrings

d. Include previous fiscal year purchase order # in comment field, if applicable.
Create a Requisition for the Computer Depot

1. Log in to PeopleSoft Financials ([www.uvm.edu/~erp/portal](www.uvm.edu/~erp/portal)).

2. Navigation: eProcurement > Create Requisition

3. On the Define Requisition tab, verify the Business Unit is UVM01, Requester name is correct, and Currency value is USD.

4. In the Requisition Name field, enter a meaningful name for the requisition. This will make searching for the requisition easier in the future. Click the Continue button.

5. Click the Catalog tab.

6. In the Vendor field, enter UVM and click Search.

7. From the list that opens, click the checkbox on the left of the desired item, adjust the quantity column as necessary, and click Add button.
8. Repeat Step 7 until all desired items have been selected.

9. If an item is not found in the catalog or a Custom Quote is needed, contact the UVM Techstore (through the UVM Bookstore) directly at 656-3067.

10. Review the Requisition Summary in the upper right hand side of the screen to ensure the items and quantities are accurate.

11. On the Create Requisition screen, on the Review and Submit tab, click the triangle-shaped Expand Section button to the left of the Requisition line.

12. Review the Ship To and change it if necessary. If the Ship To ID is not in the search list, add the address information in the comments field (See Step 23 for instructions on adding comments). *Please note: The Modify Onetime Address page should not be used for Ship To address changes.*

13. On Chartfields1 and Chartfields2 tabs, review the Chartfield values to which this will be charged (default values are displayed), and change if necessary. **Note: DO NOT change the value in the Account field.** The Account value is derived by the system, and is based on the Category selected in the item description. To change the Account, go back and change the Category code.

14. To split the item cost between multiple chartstrings, add a distribution line. Click the sign to the far right distribution line 1 to create another line.

The expense can be split by Quantity or Amount/Percent. To change how the expenses are distributed, click the Distribute By dropdown and select Qty (Quantity) or Amt (Percent/Amount). Enter the Quantity values or Percent values accordingly. Update the values in the chartfields as needed.
15. When done, click the **Save & Submit** button. This will send the order to the Depot. When they receive the order they will send an approval email. The expense for the order will be charged to the chartstring(s) provided. In the event that a chartstring is not valid, the Depot will ask for a new, valid chartstring. The requisition will be budget-checked by the Depot once they have received the valid chartstring(s).
Create a SpeedChart

A **SpeedChart** is a template that contains chartfield distributions. Using a SpeedChart will override the chartfield values that default in a requisition. If the same chartstrings are used repeatedly when creating Requisitions, using **SpeedCharts** may help speed up requisition creation.

1. Log in to PeopleSoft **Financials** ([www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)).

2. Navigation: **Set Up Financials/Supply Chain > Product Related > Procurement Options > Management > SpeedChart**

3. Searching on the Find an Existing Value tab will display SpeedCharts that have been created. Select a SpeedChart to view or edit if needed.

4. To create a new SpeedChart, click the **Add a New Value** tab and type in a SpeedChart Key (10-character description).

5. Click the **Add** button.

6. A blank Chartstring will be displayed. Additional Chartstring lines may be added if other costs or percentages of cost will be assigned to other budgets.

7. Enter relevant descriptive information in the **Description** field.
8. Click the **One User** radio button, otherwise all University users will be allowed to view and use this SpeedChart. Verify your **User ID** in the field that appears.

9. Enter chartfield values for: **GL Unit**, **Operating Unit**, **Fund**, **Source**, **Function**, **Program**, **Purpose** and **Property**.

10. If necessary, enter chartfield values for **PC Business Unit**, **Project** and **Activity**.

11. When the desired Chartstring Information is in place, click the **Save** Button.

12. The SpeedChart is now available for use in your requisitions.
Managing and Viewing Requisitions

Personalization of pages is available in PeopleSoft Financials. Review the process for Customize Column Order on page 22 in PeopleSoft Tips User Guide. The process is identical for all personalization in PeopleSoft Financials.

The Requisition Details Query provides the following information:
- PO Business Unit
- Requisition ID
- Requisition Line number
- Associated PO information PO#, line# and amount
- Vendor Name
- Vendor Invoice Number, invoice date, and invoice amount.
- Associated Voucher ID
- UVM payments made with check number and check date.

Run the Requisition Details Query
1. Log in to PeopleSoft Financials (www.uvm.edu/~erp/portal/).
3. Type UV_REQUISITIONDETAILS1 in the Search By field.
4. Click the Search Button.
5. The Query and the Run Options will be displayed.
6. Click the Add to Favorites link in the far right column to add this query to your My Favorite Queries section in Query Viewer. Once the query is added to favorites, it will be available in Query Viewer without having to search.
7. Use either option to run the query:

- **Run to HTML** - This will produce output to a browser tab. The results can be downloaded to Excel if desired. Click the HTML link to run this option.

  **OR**

- **Run to Excel** - This will run the query and download the data into an Excel spreadsheet. The results will not be displayed on screen. Click the Excel link to run this option.

8. Because this query requires that you supply criteria, a window will open requesting information for the required fields: Unit, Req ID, and PO Number.

   **Unit:** This field is the purchasing Business Unit for the requisition, which is UVM01. Enter it manually into this field, or use the search icon to select the value.

   **Req ID & PO Number:** Both the Req ID and the PO Number fields contain a % next to them. This means that either field can be used for this query. Whichever field is used, the other will need the % in it. Using either the PO Number or Requisition ID will produce the same results.

9. Running the query with either HTML or Excel starts with the same steps:

   - If only the **Requisition ID** is known, the values are entered as follows:

   ![UV_REQUISITION_DETAILS1 - Use when pymnt icon is active](image1)

   - If only **PO Number** is known, the values are entered as follows:

   ![UV_REQUISITION_DETAILS1 - Use when pymnt icon is active](image2)

   Select the **View Results** button to execute the query.
If using the HTML option, the results will be displayed in the browser tab.

![HTML Result](image1)

If using the Excel option, the results will be downloaded to an Excel file. Open the downloaded file to view the results. The location of downloaded files varies by browser.

![Excel Result](image2)

**View Chartstring Information**

Chartstrings track when and where goods and services are moving within the University. Requisition data including business unit, department, price and budget is found here.

1. Log in to PeopleSoft **Financials** ([https://catalyst.uvm.edu](https://catalyst.uvm.edu)).

2. Navigate to: **Main Menu > eProcurement > Manage Requisitions**

3. Enter the search criteria for a Requisition. Click **Search**.

![Manage Requisitions](image3)

4. Click on link in the **Req ID** column to open the **Requisition Details** page.

![Requisition Details](image4)

5. Click the **Requisition Schedule and Distribution** link.
6. View the **Requisition Information**.

7. If there are multiple lines on this Requisition, click the **Next Arrow** or **View All** option to see additional lines.
Manage Requisitions Using the Lifespan

The Request Lifespan is a tool that allows users to view each step in the procurement process. The status of where the requisition is currently in its lifespan is illustrated. Additional details can also be found here.

1. Log in to PeopleSoft Financials (www.uvm.edu/~erp/portal).

2. Navigation: eProcurement > Manage Requisitions

3. The Business Unit field will populate automatically with UVM01. This is the default Purchasing Business Unit.

4. Verify the Requester user id.

5. Enter a Requisition ID if known, or leave the field blank.

6. Verify the Date From and Date To fields to ensure that they are correct.
7. Click **Search**.

8. Requisitions meeting the search criteria are displayed.

9. To view more information regarding a particular requisition, click on the triangle to the left of the line to expand the section.

10. The **Request Lifespan** is displayed. In the Request Lifespan, links will become active as that step in the procurement process is completed. Only requisition lines that have been budget-checked to **Valid** status, approved, and have a vendor assigned to them, will move forward in the purchasing process.
11. After Purchasing Services has created a purchase order for the requisition, the Purchase Orders link will become active in the Request Lifespan section.

![Purchase Order Example]

Definitions under ‘Status’ for purchase orders are:
- PO Created – requisition is in process
- PO Approved – requisition is in process
- PO Dispatched – PO successfully processed and sent to vendor
- PO Complete – PO closed and encumbrance(s) released

12. Click the Purchase Orders link to view the Purchase Order Inquiry page. The PO Number and Requisition details are displayed.

![Purchase Order Inquiry Example]

13. As the Disbursement Center completes more steps in the procurement process, additional links will activate until the lifespan is completed.
14. An active **Invoice** icon indicates that an invoice is being processed for payment. Click the **Invoice** icon to view the voucher number, invoice amount and vendor information.

![Invoice Icon Example]

15. An active **Payment** icon indicates payment has been processed. Click the **Payment** icon to view the check number (Payment Reference ID), check date, payment address, and other payment information.

**Review Payment Information**

This section provides guidance on how to review payments to the University’s vendors.

1. Log in to PeopleSoft **Financials** (www.uvm.edu/~erp/portal).

2. Navigation: **Accounts Payable > Review Accounts Payable Information > Payments > Payment**
The **Payment Inquiry Search Criteria** page is displayed. 

*Note:* Up to 300 vendor payments are displayed. To display additional rows, increase the number in the Max Rows field, which is located below the search criteria fields.

3. Enter SHARE in the **Remit SetID** field (or use the search icon to the right of the field to select it).

4. To narrow the search results, enter a payment date range, e.g., 07/01/2015 to 06/30/16.

5. Click the search icon to the right of the **Vendor Name** field. Enter the beginning of the vendor name (e.g., **staples** for Staples Advantage) then click on the search icon to search for this vendor.

The search provides a list of all vendors whose name begins with **staples**.
Using the percent (%) sign allows for a more flexible vendor search. The search below provides all vendors with Vermont in the name.

**Note:** The search produces more than 300 results, so you may need to use specific search criteria.

The search can be further refined using the Advanced Lookup feature.

The search which contains “Vermont Com” produces a variety of results.
6. OR enter any other selection criteria. Further options can be found by using the Search icon where displayed. 

Once a vendor is selected, the vendor name will populate in the “From” and “To” Fields. Click the Search Button.

7. The Payment Inquiry results will be displayed.

   **Note:** The Payment Reference ID Number is the check, ACH or E-Payment number. The Details tab displays the vendor address to which payment was sent.

8. Click on Payment Reference ID to display more information including vouchers paid on that payment.
9. Click the Voucher ID link to display voucher-related information on the Voucher Inquiry page.
Review Voucher Information

Note: To access this page, users must have the ePro Requester security role.

1. Log in to PeopleSoft Financials (www.uvm.edu/~erp/portal).


The Selection Criteria page is displayed.

3. Change the Business Unit from UVM01 to AP001.

4. Enter the Voucher ID number or the Invoice ID number, if known.

5. Enter any other criteria to limit the data being returned. Commonly, searches are done by Vendor ID, Department, Account, Purchase Order Number or Date Range.
6. Click the **Search** button at the bottom of the page.

7. Click the tabs at the top of the **Voucher Inquiry Results** table to display: **Voucher Details, Amounts, or More Details**. Selecting the **Accounting Entries** icon displays the chartstring used on the voucher.

8. For payment information click on the **Payment Information** icon located under the Payment Information column on Voucher Inquiry Results table.

9. Click the Payment Information icon to display Payment Reference ID, Payment Date, Payment Amount, and Voucher Paid Amount.

   **Note**: The **Payment Reference ID** displayed is the check, ACH or E-Payment number.
Run the Purchase Order Activity Summary

Use the Purchase Order Activity Summary to view payment data on a purchase order and to view the invoiced-to-date totals for a blanket purchase order.

1. Log in to PeopleSoft Financials (www.uvm.edu/~erp/portal).

2. Navigation: eProcurement > Reports > PO Activity Summary

3. On the PO Activity Summary page, type in the desired search criteria. Click the Search button.

![PO Activity Summary](image)
4. The **Activity Summary** page will appear. The Details tab displays the total dollar amount of the PO Line.

   **Note:** Click on the tabs across the top individually or to view all information at once, Click the Expand All Columns icon.

![Activity Summary](image)

5. To see additional detail about the item, click **Item Description**.

![Item Description](image)

6. Select the **Invoice tab** for the total invoices paid to date. For purchase orders with multiple lines, the Invoice tab will show which lines have been invoiced to date. This tab also displays the amount remaining on this line of the purchase order in the **Un-Invoiced Amount** column.

![Invoice Tab](image)
7. Select the **Invoice** icon to display the voucher number and amount paid. Click the Voucher number to open the Voucher Inquiry page, which displays invoice number, invoice date, accounting date, etc.

![Invoice Table]

8. Click the **Activity Summary** link to return to the Activity Summary page.

9. The **Matched** tab displays the quantity and dollar amount of invoices matched on a line of a purchase order. This information is useful for monitoring blanket POs during the fiscal year.

![Activity Summary]

10. In the top right section of the page, there is a **Download to Excel** icon (looks like a grid with a red arrow). Download the data to a spreadsheet for further analysis if desired.

11. Use the **Personalize** link to rearrange the order in which page content is displayed. For example, the Amount Invoiced column, Amount Un-Invoiced column and Amount Matched column can be moved to the Details tab, thus allowing a summarized view of the purchase order activity at a glance.
**FAQs**

**Does backup documentation need to be submitted for a requisition?**

Yes, backup documents are required, and must be attached to the requisition in PeopleSoft upon submission for the majority of orders. There are a few exceptions - if you are completing a blanket order with a UVM-contracted vendor or have an RFP# for a requisition, backup documents are not required.

**What type of product description shows up on the budget reports?**

On the Budget Transaction Detail Report, purchase order information is displayed in the following order: PO Number, Vendor Name, Line Description (30 characters), and Requisition ID.

**How many approvals does a requisition go through?**

It depends on the purchase, the dollar amount, and the type of budget, but a standard workflow for orders not greater than $50,000 would be: requester to manager (or designated approver) to Purchasing Services to vendor. Please refer to the Contract Approval and Signatory Requirements for amounts over $50,000.

**Can a requisition be modified if changes are needed?**

Yes, but only if a purchase order has not yet been created. Use the Change Requisition function to modify a requisition.

**Will a copy of a purchase order be sent?**

Yes, a copy of the purchase order will be emailed to the vendor and to the requester.

**What is the turnaround time for an invoice to be paid?**

UVM default terms are Net 30 days, unless a contract/agreement states a different payment term. Expect 7 to 10 business days for the Disbursement Center to process invoices for payment.

**If a vendor does not exist in PeopleSoft, what do I do?**

Please ask the vendor to complete a New Vendor W-9 form, found on the Disbursement Center or Purchasing Services website, and attach it to the requisition. The vendor will then be added in PeopleSoft.

**How do I increase or decrease the dollar amount on a blanket order?**

Send an email to purchasing@uvm.edu that includes the following: PO#, Vendor Name, Line #, and amount of increase or decrease with new total. Estimate the amount for the remainder of the fiscal year, not just the amount for current invoices. Purchasing will make the changes and send a copy of the corrected purchase order.
Once payment is made on a purchase order, how do I close the requisition and PO to clear the encumbrance?

Please email purchasing@uvm.edu with a list of Purchase Orders and Requisitions to be closed. Use “Close POs” in the subject line of your request.

How do I change a chartstring on an Existing Purchase Order?

To change a chartstring on an existing PO, a new requisition must be created. The description should be “Add line to PO XXXXXX.” This will create a new line on the existing PO. Please note in the comments if the original line(s) should be closed.

Additional Resources

General Hints

- When entering a requisition for an individual who is providing a service, please indicate the date and nature of the service in the description field. Be sure to attach a services agreement for amounts exceeding $1,000 (services and expenses).

- Be sure to account for any freight or shipping costs on the requisition.

- Backup documentation (Employee versus Independent Contractor form, Quotes, Contracts/Agreements, etc.) must be attached when submitting the requisition.

- If a one-time shipping address is needed, please note that in the comments section. **DO NOT** use the Modify Shipping Address hyperlink.

- In choosing a **Category** be sure to open the file folder with the + sign (to the left of the menu) to reach the lowest navigation link. The descriptive link will translate into an **Account** number in the chartstring.

- There can be multiple items in a requisition, but **ONLY** one vendor per requisition.

- Track Requisition status through **Manage Requisitions**. The Request Lifespan displays the progress of the requisition to a Purchase Order to Invoice(s) to Payment(s).

- The Disbursement Center cannot overpay (within established limits) a purchase order. If an invoice cannot be paid because there isn’t enough encumbrance remaining on the PO, the invoice will be returned to the requester. To increase the dollar amount of a PO, please e-mail purchasing@uvm.edu. Estimate the amount necessary for the remaining fiscal year—not just the amount of the current invoice.

- There is an automated process to close purchase orders based on a PO being fully matched. This means a PO with a $0 balance. Purchasing Services will not contact departments to ask if a PO can be closed. It will be closed automatically when the balance is $0.

- **Do not underestimate** the dollar amount needed during the year on blanket purchase orders. If the PO is fully matched (the PO amount is $0), a system process will automatically close the PO. If additional invoices are received for a closed purchase order, a new requisition must be entered.
Vendor Information

- The UVM Vendor W-9 Form is found here: http://www.uvm.edu/~cntrlrs/forms/NewVendorW-9.docx.

  It is critically important that UVM receives a completed Vendor W-9, to set up a new vendor correctly and determine IRS 1099 Misc. tax reporting classification.

- If a requester is already in contact with a vendor, please ask that they complete the form. This will shorten the time requirement for purchase order creation.

- Attach the completed Vendor W-9 Form to the requisition.

- The results of the Vendor W-9 Form for a company will determine if an Employee versus Independent Contractor form is required.

- An Employee versus Independent Contractor form is always required for an individual that is providing services.

- The Employee versus Independent Contractor form is only to be completed by the requesting department, NEVER by the vendor.

Resources

Helpful Links

- UFS Roadshow Topics (PDF)
- Professional Development & Training Classes

Relevant UVM Departments

- Disbursement Center
- Purchasing Services
- University Financial Services

Relevant UVM Policies and Procedures

- University Procurement Policies
- University Policies and Operating Procedures