Purchasing 101 Resource Guide

Due to frequent changes, please refrain from printing this Academy/MSOM guide to purchasing.

Goals

Become knowledgeable and familiar with Purchasing processes and resources.
Comply with University of Miami Purchasing Policies.

Purchase Order Process Overview

Academy/MSOM Purchase Orders

View the full details and resources.

Terminology

**Business Associate Agreement (BAA)** – For inbound POs, this additional Conga form is required when a supplier will have access to personal health information (PHI). ([Conga > Business Associate Agreement form](#) + Reference the purchase requisition number.)

**Consultant Questionnaire** – Required for all individual consultants with rare or highly specialized expertise **TIP:** Only required for individuals, not companies. Attach to the requisition. E.g.:

**Highly Specialized**
- DNA Sequencing
- Poison Control
- Astrophysics Mapping

**Not Highly Specialized**
- Equipment Repair Person
- Party / Event Planners
- IT / Business Operations

**Inbound Goods/Services** - UM is paying to bring in goods/services. E.g., UM is purchasing furniture or catering services

**Non-Disclosure Agreement (NDA)** – For inbound POs, an additional Conga form is required when UM and the supplier will exchange confidential information in support of a specific purposes. ([Conga > Contract Administration, Business Services form](#) + Reference the purchase requisition number.)

**Outbound Services** – UM is being paid to provide a service to a counterparty. E.g., UM is being paid by another University to have a UM professor lecture at a symposium.

**Payment Matrix** – A list of commodities and their allowed UM payment process(es). Some examples and exceptions may also appear.

**Purchase Order (PO)** – A UM authorized purchase that is sent to the supplier to provide goods and / or render services.

**Purchase Requisition (req)** – A request to purchase goods or services using UM funding through Workday.
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Purchasing Help Desk Purchasing.miami.edu 1/23/24 M.R.

Pre-Approvals

Attach email approval to the purchase requisition.

- **Alcohol** - [Risk Management](#)
- **Communications** - Logos, advertising, branding, photographers, social media, websites – [UM Communications](#)
- **Database Rights and Inventions** – [Office of Technology Transfer](#)
- **Exports** – [Export Control](#)
- **Furniture/Furnishings**:  
  - CG/RSMAES – [Rosina Villavicencio](#) and [Maggie Binimelis](#)
  - Medical – [Amy Kelly](#)
- **RFPs** – [Purchasing Department](#)
- **Software/Hardware** (that will run on UM servers)  
  - Academy - [Julie Potter](#)
  - MSOM – [Nilda Labrador](#)

Purchasing Department

- **Purchasing Help Desk**
- **Training Team**
- **Purchasing Buyers**
- **PCard & TCard**
- **Sourcing Team**
- **Data Team**

Non-Purchasing Department

- **Accounts Payable**
- **Disbursements**
- **Contract Matrix**
- **UHealth Procurement (Supply Chain Services)**
- **UMIT Demand Pre-Approvals**
- **UM Communications Pre-Approvals**

**ULearn Classes Hosted by the Purchasing Department**

- **Purchasing 101 Webinar**
- **Purchasing from Diverse Suppliers**
- **Supplier Onboarding Drop-In Lab**
- **Purchase Orders**
- **Purchasing Department Contracts**