

Purchasing 101 Resource Guide



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

[Workday](#) | [Conga](#) | [Purchasing Help Desk](#) | [Policy Stat](#)
[PO Process Overview](#) | [Terminology](#) | [Contacts](#) | [ULearn Classes](#)

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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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](#)