

Purchasing Department Contracts - Resource Guide



Contracts are often needed for commodities that require purchase orders, like software, equipment, and services with milestones. Since these POs are much more complex, begin the process as soon as possible.

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Goals

Become familiar with PO contracts and resources.
Comply with University of Miami Purchasing Policies.

Purchase Order Contract Process Overview

Academy/MSOM PO Contracts
Steps 6, 7, and 8 may occur interchangeably.
View the [full details](#) and [resources](#).



Terminology

Business Associate Agreement (BAA) – This form is required when a supplier will have access to PHI. (From Conga click *Business Associate Agreement* form.)

Central Contracting Units (CCUs) – UM Departmental Contracting Liaisons

Contract Matrix – A list of contract types, descriptions, and the typical Central Contracting Unit (CCU). Some exceptions and procedural information may also appear.

Consultant Questionnaire – Required for all individual consultants with rare or highly specialized expertise *TIPS*: 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

Family Educational Rights and Privacy Act (FERPA) - A federal law that protects the privacy of student education records.

Health Insurance Portability and Accountability Act (HIPA) - HIPAA is a federal law that requires the creation of national standards to protect sensitive patient health information from being disclosed.

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

Non-Disclosure Agreement (NDA) - Contracts between UM and a current or potential supplier that allows the parties to confidentially discuss UM's purchase or potential purchase. (Conga > #1 Purchasing (Academy/MSOM...))

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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 payment process(es). Some exceptions may appear.

Protected Health Information (PHI) - Information that can identify a patient. E.g., Date of birth (DOB), email addresses, and patient medical record numbers (MRNs)

Purchase Order (PO) – A fully approved purchase requisition that is sent to the supplier to be fulfilled for goods and/or services.

Purchase Requisition (REQ) – A request to purchase goods or services using UM funding through Workday.

Redlining – The written negotiation process.

Statement of Work ("S.O.W.," "milestones" or "deliverables") A description of a given project's work.

Department of Procurement

Contacts

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Non-Purchasing Department

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[Contract Matrix](#)
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[UM Communications Pre-Approvals](#)

ULearn Classes Hosted by the Purchasing Department

[Purchasing 101 Webinar](#)
[Supplier Onboarding for Purchase Orders](#)
[Purchasing Department Contracts](#)