TIER 1
Surgery Procurement Procedures

Tier 2 Representatives (By Section):
Admin Surgery

General Surgery
Pediatric Surgery
Plastic Surgery
Thoracic Surgery
Transplant Surgery
Vascular Surgery

Wolverine Access Path:
Faculty & Staff > M-Pathways Financials & Physical Resources System
Log in to system using Level 1 Password & M-token
Main Menu > eProcurement > Purchasing Request Form

1. Purchasing Request Form* One Request Form per vendor and one vendor per M-Marketsite cart *
   a. Add a New Value
   b. Subject line:
      i. REQUIRED: Section Name – PI Last Name
      ii. OTHER HELPFUL INFO:
          Quote/Requestor Name/P-Card Purchase (P-Cards will be used on an exception basis only – provide explanation for request
      iii. in More Information Box at bottom of form)
   c. Priority: If you need within 24 hours, include a note in the “More Information Box” at the bottom of the form and call Tier 2.
   d. Due Date: Date when item needs to be delivered to lab
   e. Dept ID: N/A
   f. Group Name:
| **Vendor ID:** | N/A |
| **Supplier Name:** | Vendor Company Name |
| **Ship To:** | N/A |
| **Attention To:** | End User’s Name/Room #/Building |

**For Approver Use Only:**
- **PCard Reference:**
  - [ ] PCard Purchase
  - [ ] System Requisition/PO
- **System Req Id:**
- **PO #:**

**Item Description:** Name of product being ordered
  - i. Copy information directly from vendor website (recommended)
  - ii. Use discounted price for ONE item, where discounts apply (include Quote # in More Information Box at bottom of form, attach copy of Quote, if needed)

**Quantity:** Number of items being requested (Use “1” for cart orders)

**Unit Price:**
  - i. Actual price for ONE item; do not include shipping
  - ii. Use discounted price for ONE item, where discounts apply (include Quote # in More Information Box at bottom of form, attach copy of Quote, if needed)

**Catalog Number/Vendor ID:** REQUIRED! Purchase Request Forms without catalog numbers will be returned. Catalog numbers are required by vendors and Tier 2 representatives lack scientific knowledge of products to attempt to find catalog numbers on vendor websites.

**Shortcode:** N/A (include shortcode in upper portion of form)

Repeat description, quantity, unit price, catalog # for additional items from the same vendor.
a. **More Information Box:** Add comments, special instructions, quote information, P-Card justification explanation and link to vendor website, Material Transfer Agreement (MTA)/Unfunded Agreements (UFA) information. MTAs or UFAs must be completed prior to orders being placed. Contact your Surgery Pre-Award representative for assistance with documents (list attached).

b. Click “Save”

c. Request now assigned a sequence number (upper left corner of form)

d. **Attachments:** If there is an attachment needed (quote, primer sequences), attach via the “Attachments” tab at the top of the form. All primer sequences must be in Excel format.

e. Click “Submit”

**TIPS:**

- Use Tab key to move between fields on form
  a. If request is denied, form will be returned to Tier 1 with an explanation. Form can be edited and resubmitted.
  b. Purchase Request Forms can be canceled by clicking “Cancel Request” while form is in Pending Status
  c. Search for Purchasing Request Forms by using the Sequence Number on the “Find an Existing Value” tab or via the link in emails generated by the ordering system.
2. Assigning a cart to Tier 2 user in M-Marketsite
3. Main Menu > eProcurement > Create Requisition > Add Items and Services > Web > M-Marketsite
   a. Select vendor and choose items to order using the M-Marketsite punchout system
   b. Submit the cart, review it and proceed to checkout
   c. The next page allows you to review/change the shortcode and shipping address.
   d. Select “Assign a Cart” and search for an assignee
      i. Type in Tier 2 user’s name or unique name and Search.

   ii. Select and assign the cart to Tier 2 user

   e. To reassign a cart to another Tier 2 user:
      i. In M-Marketsite hover cursor over the picture of a cart in left margin
      ii. Hover over “My Carts and Orders”
      iii. Click “View Draft Shopping Carts”
      iv. Click “Unassign”
      v. Click “Reassign” and add new Tier 2 uniqname

3. Find an Existing Request
   Main Menu > eProcurement > Main Menu > Purchasing Request Form
   c. Click “Find an Existing Value”
   d. To search by the Sequence Number of the request, type it in Sequence Number OR Enter other information in the appropriate field. For example, type a full or partial subject in Subject.
   e. Click “Search”
   f. Click any value in a row to go to the corresponding request.
g. Check the information in the “For Approver Use Only” area.

4. **Look Up a Purchase Order Number**
   Main Menu > eProcurement > Manage Requisitions
   c. Delete the dates in the “Date From” and “Date To” fields
   d. Type the Purchase Requisition Number in the “Requisition ID” field
   e. Click on the Requisition Number
   f. Click on “PO Information” to locate the Purchase Order Number.
5. **Receiving Goods - this is a required step and will be monitored.**

**Receive Goods by Purchase Requisition #:**
Main Menu > eProcurement > Manage Requisitions

- Once goods arrive, mark items as received in Wolverine Access
  - If there is an issue with receiving goods, it is Tier 1’s responsibility to notify the Tier 2 for follow up with vendor.

- Search for order based on:
  - Requisition Number: Listed on the Purchasing Request form. Search for the form or use links from approval emails in your inbox.
  - Requester: Search by the uniqname of the Tier 2 representative in the Requester Field. Dates can also be added in the Search area to filter results.
  - Purchase Requisition titles will use the following naming convention: Tier 1 Uniqname-Vendor-Order Date

- Select “Receive Order” from the drop down list next to the appropriate order Click “OK”

- Verify items and quantity received are correct

- Check boxes (or use check all) for items to be marked as received

- Click “Received Selected”

- If applicable, use the Receipt Comments field to make notes on receiving goods
  Click “Save Receipt”
Receive Goods by Purchase Order #:
Main Menu>Purchasing>Receipts>
Add/Update Receipts

a. Click “Add”
b. Type PO ID or select a value from the Lookup in the ID field
c. Click Search
   Note:
   – Do not press Enter button on keyboard to search
   – Search results display the lines of the PO in the Retrieved Rows section
d. Turn on the checkbox for the line(s) that is to be received
   Note: If applicable, click “Check All” to select all lines for receiving
e. Click “OK”
f. Verify or type the quantity received for each item in the Received Quantity column
   Note:
   – The default value in the Receipt Quantity column is the PO quantity and only needs to be changed if a different quantity is received
   – If the PO is set up to receive by amount, type value in the Received Amount field (not shown). The received amount populates the balance of the PO
   Click “Save”
TOOLS & RESOURCES

Post Award Procedures Manual:
http://medicine.umich.edu/medschool/research/office-research/grant-review-analysis/post-award-information

M-Pathways Instructions:
  h. Create a Request form Step-by-Step
  i. Casual Receiving Step-by-Step