TIER 2
Surgery Procurement Procedures

Tier 2 Representatives (By Section):
Admin Surgery (Lubman)

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 > Approval/Review a Form

1. Placing Orders via Wolverine Access:
   a. Search for Purchasing Request Form using Sequence Number from email generated by ordering system.
   b. Click “Go to Form”
   c. Review form, ensure all data has been provided and see the “More Information Box” for any special instructions: P-Card justification explanation, MTA/UFA information (completion of documents required prior to order placement – direct Tier 1 to Pre-Award Contact, list attached), etc.
   d. Login to M-Reports: Wolverine Access > Faculty & Staff > Reporting > M-Reports
      i. Verify that the Tier 1 name is associated with the PI.
      ii. Verify order placed within the budget period. Contact SAPOC for clarification if necessary.
      iii. Verify adequate budget in proper budget category. Contact SAPOC for any discrepancies.
      iv. Review Uniform Guidance and/or award/agreement in eRPM.
   f. To deny a Purchase Request Form for missing data, invalid short code or unallowable expense:
      i. Click “Approve/Review a Form,” Enter the Sequence Number of the form to be denied
      ii. Explain the reason for denial in the “Comment” box
      iii. Click “Deny”
      iv. Email notification will be sent to the Tier 1
      Befor denying a PRF, the Tier 2 should first try to resolve by referring to their resource documents and/or contacting the Tier 1 via phone or email.
   g. Create a Purchase Requisition: Open new session of Wolverine Access (use “New Window” button to avoid error messages, per ITS):
Main Menu > eProcurement > Create Requisition
TIP: When defining a requisition, use the “Ship To” field in the Shipping Defaults section to search for a room # for delivery. Click on the and in the Sector field

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add a room # and click “Look Up.” Click on the correct building/room #. Verify that the “Ship To” and “Location” fields have the same building #.

h. Copy/paste order information into Purchase Requisition or retrieve cart for M-Marketsite orders.

i. Use the following naming convention for Purchase Requisitions:
Tier 1 Uniqname – Vendor Name – Date of Order

j. M-Marketsite Cart Substitutes: When a Tier 2 will be out of the office, a substitute can be assigned in M-Marketsite so all carts are automatically forwarded to another Tier 2 during an absence:

Go to M-Marketsite / Click “Picture” of Cart / My Carts and Orders / View Draft Shopping Carts

Click “Assign Substitute” and Search for Tier 2 Substitute’s name and Click “Select.”
All Carts will be automatically forwarded to Substitute.
k. When Purchase Requisition number is assigned, add that number to the Purchase Requisition Form, click Save and click Approve (email notification sent to Tier 1 that request has been approved).

2. Placing orders via P-Card:
   a. Tier 1 notes P-Card purchase and justification explanation in “More Information Box” on the form.
   b. Tier 2 makes the determination whether or not use of the P-Card is warranted.
   c. If order is placed via P-Card, Tier 2 will add the vendor order confirmation number to the PCard Reference # field in the Purchasing Request Form and approve (Tier 1 will receive email confirmation).
   d. P-Card reconciler should attach the packing slip or a verification e-mail that the goods were received in Concur.

3. WebNow: Vendor order confirmations need to be added to WebNow for all vendors that have a strategic contract with the university. See the procurement website for a complete list: [http://www.finance.umich.edu/procurement/howtobuy/universitycontracts](http://www.finance.umich.edu/procurement/howtobuy/universitycontracts)
   a. Click “Capture”
   b. In the Document Keys window select “FN ERECON” from drop down menu
   c. Enter the PO # from the order in the “PO No.” field
   d. Enter the Proj/Grant # from the order in the “Project/Grant No.” field
   e. Choose PO from the drop down list in “Document Type”
   f. Click “Add” in the upper right corner
   g. Locate the electronic version of the order confirmation (pdf, docx, xls or tif only), select the file and Click “Capture”
   h. Message: The files have been successfully added & Click “OK”
4. Additional Approval – Purchasing Request Form:
   a. If additional level of approval is required by the PI:
      i. Click “+” next to Multiple Approvers
      ii. Add PI’s uniqname in box and Click “ “
      iii. Click on PI’s name from list
      iv. Click “Insert”
      v. Click “Approve”
      vi. Request will be routed to the PI and an email notification sent. When the PI
          wants to approve the Purchase Request Form and route it back to the Tier 2:
          1. Click “+” next to PI’s name in Approved Box
          2. Add Tier 2’s uniqname in box and Click “ “
          3. Click Tier 2’s name from list
          4. Click “Insert”
          5. Click “Approve”