

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:

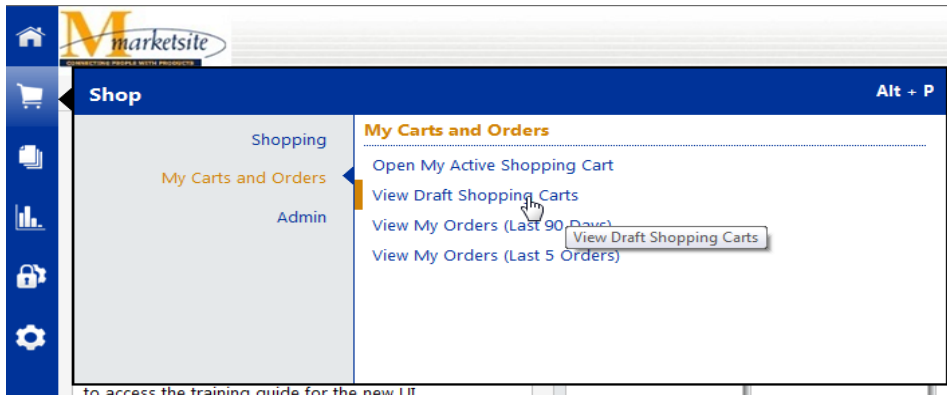
- a. Search for Purchasing Request Form using Sequence Number from email generated by ordering system.
- b. Click "Go to Form"
- c. Review form, ensure all data has been provided and see the "More Information Box" for any special instructions: P-Card justification explanation, MTA/UFA information (completion 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

Before 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.

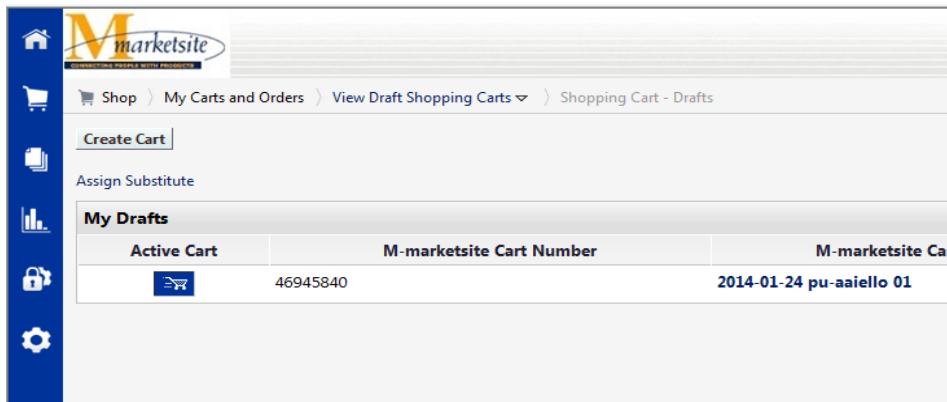
- g. Create a Purchase Requisition: Open new session of Wolverine Access (use "New Window" button to avoid error messages, per ITS):
Main Menu > eProcurement > Create Requisition
TIP: When defining a requisition, use the "Ship To" field in the Shipping Defaults section to search for a room # for delivery. Click on the  and in the Sector field

- 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:

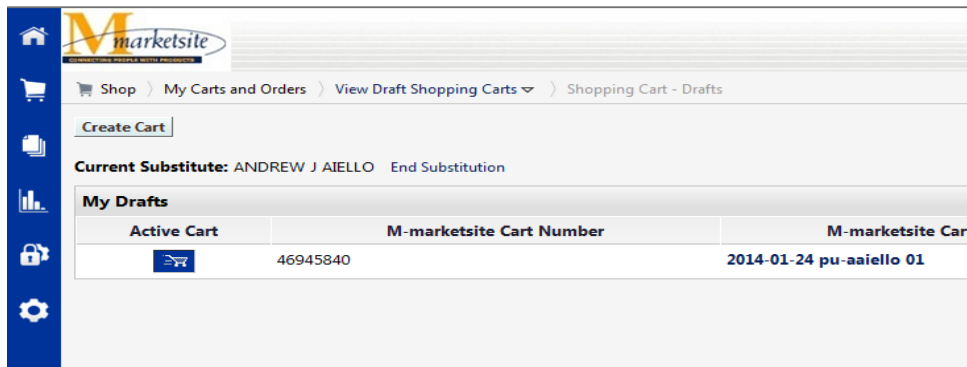
Go to M-Marketsite / Click “Picture” of Cart / My Carts and Orders / View Draft Shopping Carts



Click “Assign Substitute” and Search for Tier 2 Substitute’s name and Click “Select.” All Carts will be automatically forwarded to Substitute.



Click “End Substitution” to turn off automatic forwarding.



- 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 Requist 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> Faculty & Staff > WebNow

- 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 unqname 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 unqname in box and Click “”
 3. Click Tier 2’s name from list
 4. Click “Insert”
 5. Click “Approve”