P2P Newsletter

Recent System Design Changes

The requested delivery date field is no longer required for requisitions (catalog and non-catalog). If you want to specify a delivery date when creating a requisition you can; however, it is no longer required.

Notifications to requisitioners have been enabled to provide an email confirmation when a PO has been successfully sent to the supplier. This confirming email is sent from support@sciquest and will include your purchase order number in the subject line.

Upcoming System Design Change for Receipts —2/28/2020

The following change is schedule to be effective as of 2/28/2020

Current Requirement: No receipts required for catalog and non-catalog goods < $2,500

As of 2/28/2020:   Receipts will be required for **non-catalog goods** => $0

UR Procurement (Workday) Upgrade on 3/9/2020

On Monday, March 9, Workday will be upgraded with changes to streamline the create requisition and requisition checkout process. To learn more about these changes, you can sign up for an Overview Session (March 3rd or March 5th) at the link below or you can visit the UR Procurement Website to review a recorded session of the overview.

https://www.signupgenius.com/go/9040E4EAAAE29AA8-p2psystem2

Coming Soon—New UR Marketplace Suppliers

Perkin Elmer Health Science and B&H Photo catalogs will be coming soon to the Marketplace. Stay tuned for updates.

How to tell which Purchasing Assistant Category Manager (ACM) is working on your non-catalog requisition and if/why it is on hold.

A P2P Tip and Trick for this can be found in P2P Self Help Requisition Tips and Tricks Section.

New Detailed Reference Guide: P2P Find Supplier Reference Guide

To supplement the Tips and Tricks: *How to preview a supplier record*, a detailed reference guide has been added to the P2P Self Help = **General P2P Support Tools** section. This reference guide contains detailed information for searching for suppliers, important information to look for on the supplier's record, advanced searching tips, helpful information when requesting a new supplier or requesting changes to a supplier's contact info, and making a supplier a Favorite.

Align Receipts and Invoices: P2P Invoice from Receipt Reference Guide

Accounts Payable will be using enhanced functionality so that, if desired, you can align receipts to specific paper invoices. A reference guide has been added to the P2P Self Help = ***Receiving Support Tools*** section that provides detail on the process that alerts Accounts Payable to utilize your receipt number for entering the invoice. Some additional testing and documentation needs to be completed for AP to start using the enhanced functionality but user departments can start providing their RCT# on invoices now.

Supplier Request Guidance

The Help Text for the task: *Create Supplier Request* is being enhanced to clarify information that will help the P2P Service Center and Accounts Payable set up the supplier correctly. Please remember the Supplier Request should only be used for suppliers that will be paid via Supplier Invoice Request. We are now asking that you provide the following information in the Justification field:

> Brief explanation of what the supplier is being paid for (example: For performance payment)

> Indicate if this is an urgent request (example: Payment is already past due)

> If the Supplier is being requested for a one-time payment and your department has a Pcard, first see if the payee will/can accept a Pcard payment. Otherwise, indicate the Supplier is needed for a one-time payment and Pcard was not accepted.

> Indicate if a Sales Tax Exemption form is requested by the supplier. By doing so, you do not have to send a separate request to Accounts Payable to request the tax-exempt form.

Additional guidance is also being provided in the Help Text to clarify what documentation should be attached.

Supplier Qualification process for Independent Contractors:

All prospective independent contractors, should visit our Supplier Qualification Website **https://www.urmc.rochester.edu/purchasing/supplier/qualification.cfm** to complete the qualification process. This is necessary to assure we are classifying independent contractors correctly and mitigate risk to the organization by having signed terms and conditions and appropriate insurance. As part of the supplier qualification process, it is mandatory that all independent contractors complete the **Supplier Size Self Certification** form. In addition, all independent contractors must review and sign University of Rochester's **Terms and Conditions**. Please note that any change requests to alter our terms and Conditions can increase lead time as it requires further review from our category manager. Furthermore, all independent contractors must provide a current copy of their **Certificate of Insurance**. If, for some reason the independent contractor falls short of our coverage requirements OR is lacking insurance altogether, more information will be asked of the department which will be reviewed by the Purchasing and Legal departments for approval.

In addition to the supplier qualification process, there are specific documents required (see below) for independent contractors that should be attached to the requisition. These forms can be found at https://www.urmc.rochester.edu/purchasing/forms-bank.cfm

Independent Contractor Certification Form
Initial Assessment Questionnaire IC v EE

Professional Services Agreement

If you have any questions, please feel free to reach out to Purchasing at: 275-2016 or 273-4465

312 Requisitions submitted after P2P go-live

After you are live on the P2P system, you should no longer submit 312 requisitions to Purchasing. You should begin to transition your requisitions to the P2P system. 312 requisitions submitted after your go-live date may be returned with a request to process the requisition in the Procure to Pay System.

P2P Status Report

Total Requisitions: 19,066

Requisition Average Turnaround Time: 6.13 Days

Requisition Qualified Supplier Turnaround Time:	7.86 Days
New Supplier – Non Catalog Turnaround Time:	12.37 Days
Marketplace Order Turnaround Time:	1.76Days

Total Supplier Invoice Requests: 14,947

SIRs Total Turnaround Time: 2.80 Days