



Blanket Purchase Orders

A new [blanket purchase order page](#) has been added to the UR Procurement Website to provide guidelines, solutions and reference guides for blanket purchase orders in the P2P system. See additional details on the information that has been posted below. Notifications will also be sent out to departments regarding upcoming PO expirations for the remainder of 2020.

Blanket Purchase Order Guidelines

Please review the Blanket Purchase Order Guidelines below if you currently have blanket purchase orders in use in your department and need further guidance. Note that clinical/patient care supply items are out of scope. You should continue to use your current process for ordering these items outside of P2P.

PMM/P2P Blanket Purchase Order Guidelines



Purchase order Status	Department Action Required
Expired Blanket Purchase Order – No outstanding Invoices	(1) No action required for PMM Blanket PO (2) If you want to renew the PO, submit a requisition in P2P
Expired Blanket Purchase order - Outstanding invoices	(1) Required: Submit a 312 requisition to Procurement_Service_Center@ur.Rochester.edu to request an amendment to add dollars to process outstanding invoices. (2) Optional: If you want to renew the PO, submit a requisition in P2P.
Blanket PO Expiring 6/30/2020 – 12/31/2020 (With/Without a remaining available balance)	(1) PMM PO will not be extended (2) If renewing the PMM PO is desired (upon expiration), submit a requisition in P2P to renew.
PO Expiration Date 01/01/2021 or later	(1) PO will remain active in PMM and further direction/guidance will be provided

Blanket Purchase Order Solutions

To assist with identifying the appropriate solution based on your blanket purchase order need, please utilize the **Blanket Purchase Order Solutions Guide**. This can also be found in the **Buying and Paying Guide** in the P2P Self Help Section.

Solution #	Category	Example	Frequency	Payment Structure	Recommended Solution(s)	Required Attachments	P2P Documentation
1	Single project with one labor rate	Consultant/Independent Contractor	hourly billable	billied over time, single rate	Non-catalog goods line, description to reference the type of labor being performed, quantity-anticipated hours, total value = hours x rate; A zero dollar non-catalog Service Line for Start and End Date	Consultant/Independent Contractor Forms, Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Consultant/Independent Contractor Reference Guide
2	Repeating goods purchases	Lab Supplies	Multiple orders as needed	Multiple payments as orders are placed	Juggler Catalog, Non-Catalog Goods Line, Requisition Template, create requisition from non-catalog requisition	Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Requisition Reference Guide P2P Marketplace Reference Guide P2P Create Requisition from Non-Catalog Requisition
3	Single service purchase, non-repeating	Discrete project (i.e. Roof Repair)	hourly billable	billied over time, single rate	Non-catalog goods line, description to reference the type of labor being performed, quantity-anticipated hours, total value = hours x rate	Contract/Statement of Work, Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Requisition Reference Guide
4	Software Maintenance Fees	EPIC-EMR	Annual	Single payment	Non-Catalog Service line including start date/end date and dollar value	Proposals and any associated contracts/agreements, Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Single Payment Software Maintenance Blanket PO QRG
5	Software License Fees	ORACLE-Site License	Annual/Multi-Year	Single payment	Non-Catalog Service line including start date/end date and dollar value; If multi-year license, create a separate line for each year	Proposals and any associated contracts/agreements, Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Single Payment Software Maintenance Blanket PO QRG
6	Software License Implementation Fee	Bio-Optronics-Scheduling Software	One-Time	Single payment/Milestone Payments	Non-Catalog goods line	Proposals and any associated contracts/agreements, Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Progress Payments Blanket PO Reference Guide
7	Software License	Adobe	One-time	Single payment	Non-Catalog goods line	Proposals and any associated contracts/agreements, Supplier Price Justification Conflict Information Form if >=\$25,000	P2P Requisition Reference Guide
8	Equipment repair	Printer, Fax, Scanner	One-Time	Single payment	Non-catalog goods line and include equipment description, model and serial number in the item description field Phlebotomy Equipment can accept Pcard, P2P PO &MY Testing (Mer Cor Particulars) can accept Pcard, P2P PO Up and Running and Fax Doctor should continue outside of P2P	Supplier Quote/contract, Capital Data Sheet, Supplier Price Justification Conflict Information Form =>\$25,000, any other correspondence. These attachments should be uploaded separately.	P2P Requisition Reference Guide
9	Equipment Maintenance - single/multiple piece of equipment	medical, lab or office equipment maintenance	Annual, Quarterly, Monthly	Multiple payments	Non-catalog service line and include equipment description, model and serial number in item description field	Supplier Quote/contract, Capital Data Sheet, Supplier Price Justification Conflict Information Form =>\$25,000, any other correspondence. These attachments should be uploaded separately.	P2P Capital Equipment Maintenance QRG
10	Equipment Lease	Vehicle, copier	Annual, Monthly	Multiple Payments	Non-catalog service line and include equipment description, model and serial number in item description field	Supplier Quote/contract, Capital Data Sheet, Supplier Price Justification Conflict Information Form =>\$25,000, any other correspondence. These attachments should be uploaded separately.	P2P Capital Equipment Maintenance QRG

Blanket Purchase Order Reference Guides

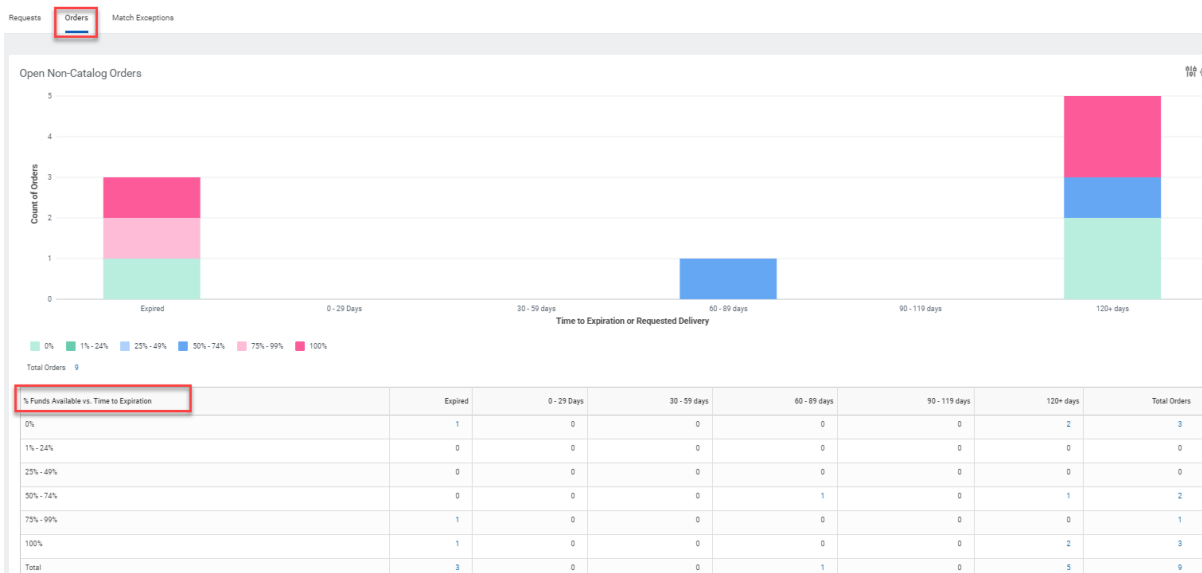
Upon determining the appropriate blanket purchase order solution, P2P Blanket Purchase Order Reference Guides are available to provide step by step instruction to create your requisition in P2P.

Blanket Purchase Order Quick Reference Guides

- P2P Solution #1 [P2P Consultant Independent Contractor Reference Guide](#)
- P2P Solution #2, 3, 7 & 8 [P2P-Requisition-Reference-Guide](#)
- P2P Solution # 2 [P2P-Marketplace-Reference-Guide](#)
- P2P Solution #2 [P2P Create req from prior non-catalog req](#)
- P2P Solution # 4 & 5 [P2P Single Payment Software Maint Blanket PO Reference Guide](#)
- P2P Solution #6 [P2P Progress Payments Blanket PO Reference Guide](#)
- P2P Solution #9 & 10 [P2P Capital Equipment Maintenance QRG](#)

Managing Purchase Order Expiration Dates in P2P

You can manage purchase order expirations (service lines) in Workday from your UR Procurement Worklet. Select the Orders tab and you will have visibility to your orders with service line expirations. The chart identifies time frames to PO expiration as well as the percentage of funds available.



Blanket Purchase Order Support and Assistance

If you need support or assistance with creating requisitions in P2P for blanket purchase orders, please contact the P2P Service Center below.

- P2P Service Center: 275-2012
- Email: URProcurement@rochester.edu
- Service Desk Requests: <https://service.rochester.edu/procurement>