Importance of Purchasing Attachments
SCM Purchasing Office Hour
March 8, 2022
Welcome!

- This is our 2nd SCM Office Hour of 2022!
- These monthly Office Hours events provide an opportunity for our customers to ask questions and get answers
- We’ll give a short presentation, and then open it up to YOUR questions!
Today’s Presenter…

- Jim Hewlett, SCM Communications Analyst, Training and Website Developer
- Jim thanks the other SCM staff who are present today to assist with questions!
Today’s Topic: Purchasing Attachments

- The **Requisition** and **Purchase Agreement** documents in the Kuali Financial System (KFS) capture all of the *minimum* information required for processing all purchasing transactions.

- HOWEVER, depending on the type of transaction, other forms may be required to successfully process the purchasing request.
Attachments Record Additional Information

- The required forms include the completion of **additional information** that is needed to process that specific type of transaction.
- The required forms also include **additional signature approvals** that are necessary for specific transaction types.
- Today’s focus is on attachments needed for KFS documents, primarily Purchasing documents.
Ensuring that any necessary forms are electronically attached to your KFS documents can significantly expedite the processing and approval of your KFS document by Procurement & Contracting Services.

If the forms aren’t attached, P&CS cannot complete the necessary supplier negotiations and selections and issue the Purchase Order.
What NOT to Attach to Purchasing Documents

- Sensitive personal information, including social security and credit card numbers, should NEVER be included on any KFS attachments.

- Patient Health information should also NOT be attached to any KFS documents.

- *Transactions that require the use of sensitive data, such as new vendor submissions, utilize data encryption processes that ensure the protection of said data.*
Forms Most Frequently Used

- Conflict of Interest - Report of Proposed Transaction
- Independent Contractor (Individual) Pre-Hire Information Form
- Source Selection & Price Reasonableness Justification Form
  (additional Sole Source Justification form is also required if using
  the form for a sole source request)
- Covered Services Carve Out Request Form
- Approval Form for Software and Related Services
- Confirming Order Justification
Forms Pages:

- Procurement and Contracting Services Forms Page:
  - [https://supplychain.ucdavis.edu/forms/pcs](https://supplychain.ucdavis.edu/forms/pcs)

- All Forms Page (for ALL areas of SCM):
  - [https://supplychain.ucdavis.edu/forms](https://supplychain.ucdavis.edu/forms)

- Attachments for Business and Revenue Contracts Agreements:
  - [https://supplychain.ucdavis.edu/procure-contract/biz-rev-contracts/contract-request#required](https://supplychain.ucdavis.edu/procure-contract/biz-rev-contracts/contract-request#required)
Your Turn!

- Feel free to ask questions in Chat!
- We’ll call on you to unmute and ask your question(s).
- Thanks for your time today.