

UCDAVIS

Supply Chain
Management

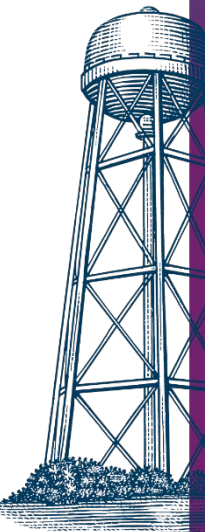
Importance of Purchasing Attachments

SCM Purchasing Office Hour
March 8, 2022



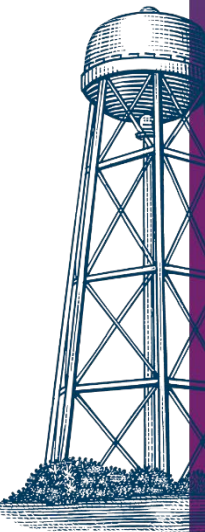
Welcome!

- 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!



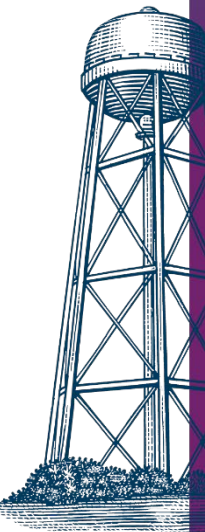
Today's Presenter...

- Jim Hewlett, SCM Communications Analyst, Training and Website Developer
- Jim thanks the other SCM staff who are present today to assist with questions!



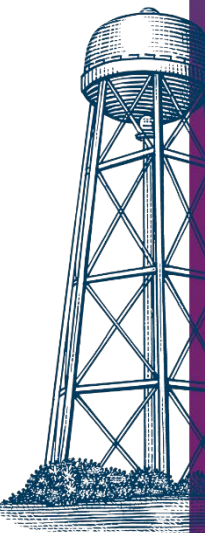
Today's Topic: Purchasing Attachments

- 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.



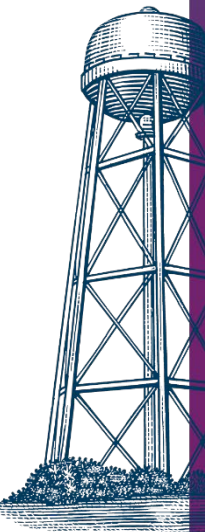
Attachments Record Additional Information

- 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.



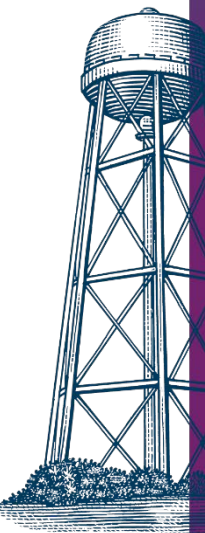
Attachments Expedite Document Processing

- 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.



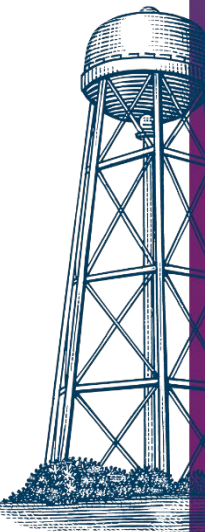
What NOT to Attach to Purchasing Documents

- 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.*



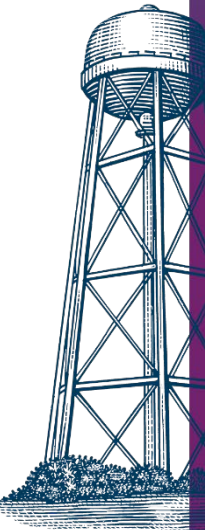
Forms Most Frequently Used

- 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>
- All Forms Page (for ALL areas of SCM):
 - <https://supplychain.ucdavis.edu/forms>
- Attachments for Business and Revenue Contracts Agreements:
 - <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.

