

PROCEDURE FOR MUNIS GENERATED REQUISITIONS WITH THE OFFICE OF SPONSORED PROGRAMS

PURPOSE

The purpose of this procedure is to document the collaboration between the Purchasing and Contracts and Office of Sponsored Programs departments in the processing, modification, and notification of MUNIS generated purchase orders.

PROCEDURE

The following procedures shall be applicable when purchase orders are created and submitted by MUNIS users on campus, and direct the approval requirements of such requests as well as staff notification of processes and procedures.

REQUISITION APPROVAL

The Office of Sponsored Programs shall approve requisitions using grant funding prior to the requisition being routed to Purchasing for conversion to a purchase order. To accomplish this, where paper requisitions are still being utilized the Purchasing staff will be responsible for routing the paper requisition to the Office of Sponsored Programs for review. Requisitions submitted through the MUNIS system will be electronically routed to the Office of Sponsored Programs for review. Electronic routing through MUNIS will consist of the following criteria and steps:

- Any requisition equal to or greater than \$5000 will be routed to the Office of Sponsored Programs for review.
- Any requisition under \$5000 will not require Office of Sponsored Programs approval and will be routed directly to Purchasing after departmental approvals are obtained.
- Any requisition submitted for hosting activities that is using grant funding will be routed to the Office of Sponsored Programs regardless of amount.
- The Office of Sponsored Programs will approve or reject the requisition based on:
 - Sufficient funds within the specific grant account line as well as verification that the correct grant account is used.
 - The expiration date of grant.
 - Allowable expenditure within the specific grant; some grants do not allow certain material/equipment to be purchased. For example, if a department requests a particular piece of equipment on a requisition and the equipment is not allowed on that grant, the Office of Sponsored Programs must reject the request.
- If the requisition is rejected, Office of Sponsored Programs staff will be responsible for including comments as to why the requisition was rejected which will assist the end user in deciding on how best to proceed with their request.

- The requesting department must correct the requisition and contact their designated Research Administrator within the Office of Sponsored Programs.
- If clarification is necessary, Office of Sponsored Programs staff may contact the submitting department for additional information.
- Campus departments should contact the Office of Sponsored Programs if they have any questions or issues with accounting funds as it affects their requisition.
- Once approved the requisition will be routed to Purchasing for processing. Any requisition received by Purchasing with the appropriate Office of Sponsored Programs staff approval will be considered to have met all necessary requirements and will be processed without further approvals being sought.

PURCHASE ORDER MODIFICATIONS

When a requisition is submitted using grant funding and is below the \$5000 threshold, but is subsequently modified through the purchase order modification process and the modified total of the purchase order is below \$5000, the requisition will not need to be approved by the Office of Sponsored Programs.

If, however, the modified total of the purchase order is above \$5000 and is being increased using a grant account the requisition will require approval from the Office of Sponsored Programs. Additionally, any subsequent modification to that purchase order using a grant account which increases the amount of the purchase order will also require approval from the Office of Sponsored Programs.

For example, if a purchase order was originally issued for \$3000 and a subsequent modification request is submitted to Purchasing for a \$3000 increase using a grant account then the purchase order modification needs to be sent to the Office of Sponsored Programs for approval prior to the modification being completed by the Purchasing staff. If the same purchase order is modified an additional five times, each time using a grant account, then each modification request must first be approved by the Office of Sponsored Programs.

The process for gaining approval from the Office of Sponsored Programs prior to the modification being processed by Purchasing is as follows:

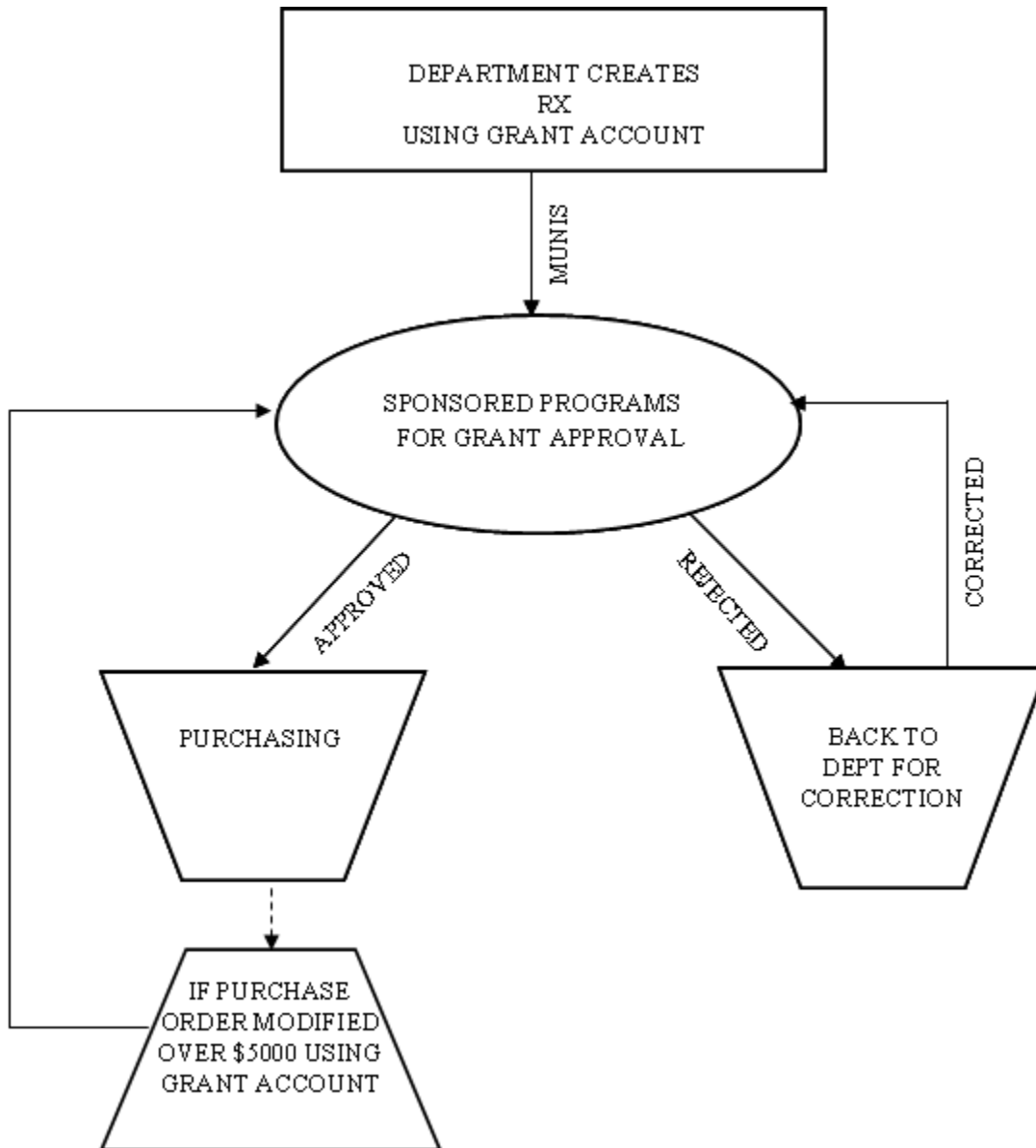
- The purchase order modifications form will need to be either faxed 895-4379 or scanned and emailed to the Office of Sponsored programs.
- Faxes can be sent to the attention of Kathleen Norton and emails can be sent to her as well. Kathleen will be responsible for routing the modification to the appropriate Research Administrator.
- The Research Administrator will clearly mark the modification form as approved or rejected on the front of the form.
- The modification form will be faxed or scanned and emailed back to the appropriate buyer once approved or rejected.

STAFF INTEGRATION AND NOTIFICATION

It will be the responsibility of both the Purchasing Department and the Office of Sponsored Programs to review with existing and newly hired staff this procedural document to ensure compliance.

Additionally, any change in these procedures shall be disseminated to the staffs of both departments after such changes have been agreed to by the management team of each respective group. It is important for the staff of each department to be aware and comfortable with these procedures and for there to be consistency across all disciplines when handling these requests.

FLOW CHART FOR PURCHASE ORDER APPROVAL PROCESS BY THE OFFICE OF SPONSORED PROGRAMS.



Revision 1
5 September 2008
Approved for departmental use