Simmons UNIVERSITY

Purchasing Process Flowchart

START:
Obtain Contract/Agreement/Estimates for Goods or Services

FOR CONTRACTS

Prepare a contract routing form to be sent for the following signatures:

- Departmental Budget Authority Figure
- General Counsel
- Any other signatures required as indicated

Submit with the routing form all other documentation needing signatures, including: bids, quotes, Sole Source Justification form (if needed), and Competitive Bid Form (if needed).

Signatures Received; Contract Approved

FOR ESTIMATES/ BIDS/QUOTES

If over $5,000, acquire competitive bids or a prepare a Sole Source Justification form as indicated per Bid Policy (see Purchasing Policy).

Submit all documentation needing signatures, including: bids, quotes, Sole Source Justification form (if needed), and Competitive Bid Form (if needed).

Select a vendor then proceed to next step.

Total FY Expenditure $1 -$1,000

PO Not Required

Contact supplier directly to place order

Services Rendered

Supplier Provides Invoice

Supplier Accepts Credit Card Payments?

Yes

Pay for Services/Goods via Corporate Credit Card

No

Enter Invoice in Workday for Direct Payment
(Visit the Accounts Payable webpage for Invoice assistance)

Total FY Expenditure $1,001 - $5,000

Limited Availability
(Based on cardholder credit limits)

Recommended

Total FY Expenditure $5,001 - $25,000

Create a Requisition for total FY expenditure

Attach: Quotes, contracts, contract routing forms, etc.

Requisition to PO to Invoice Process

1. Requisition is submitted and goes through Approval Process
2. Requisition is Approved
3. Purchase Order is issued and sent to supplier, unless otherwise noted.
4. Services Rendered
5. Supplier Provides Invoice

Enter Invoice Against Purchase Order for Payment
(Visit the Accounts Payable webpage for Invoice assistance)

See Purchasing Policies and Guides for more details:

Purchasing Policy
Credit Card and Business Expense Reimbursement Policy
How to Purchase
Purchasing How-to Guides & Forms