

Requisition Wizard (Purchase Orders)

The Requisition Wizard is used for goods purchased with a total over \$5,000 that are not on state contract and all services. For goods purchased totaling less than \$5,000, or goods purchased for state contract items, use the Non-Catalog item add. If you are unsure which process to follow, use the requisition wizard. For multiple regular payments over a period of time, use the Standing Order Request.

1. From the Home Page, click on the **Requisition Wizard** under Procurement Forms.

Shop um+		AI -	Search (Alt+Q) Q	0.00 USD 崔	☆ <0	0 1
Shop • Office Supplies					۵	+
AP Role. Approver Dashboard Facility Supplies Help Dashboard IT Supplies Lab Supplies Legacy View Office Supplies Shopping Home.						
Organization Message	Office Supplies Suppliers					
	Office Suppliers					~
System Performance Issues Users are expensioning slowed performance when working in ShopUV+ at this time. Our software provider is working on a resolution. Thank you for your publicity.	STAPLES Staples					
ShopUWL System Updates - Changes are Live System updates were released on 7/25 by our software vendor. You'll find information regarding changes to ShopUW+ on a new 'System Updates' page on the ShopUW+ Essentials website.	Procurement Forms					~
New ShopUW+ Approval Reminder Emails On Saturday, July 17, new ShopUW+ approval reminder functionality will be turned on. These reminder emails prompt ShopUW+ workflow Approvers to review and approve requisitions, purchase orders, and invoices. More information will be provided closer to July 17.	Regulsition Wizard	Standing Order Request				
Fiscal Year End Fiscal year end activity will start at 5.00pm 6/29. Shopping and invoice creation may continue as normal. Transactions will be visible in SFS when fiscal year-end activities have concluded.						
Important Update: Requisition Wizard As of 6/25, you will be instructed to use the attachments tab on the Requisition Wizard instead of the file uploads in most places on the form (e.g. sole source will remain on the waive of hidding tab but purdex on on the new attachments tab).	AP Forms					~
Requisition Wizard (Previe	Direct Payment Form	Payment to Individual Request	Refund of Receipts	Chec	k Action	
Form Number 4030613 Purpose Procurement Request						

- 2. Click **Next** on the Instructions page
- 3. Enter the Supplier's name. For individuals use the last name. Click **Search**.

ShopUN+			
Shop + Shopping + View Forms			
Back to Shopping Home			
Requisition Wizard	Suppliers		Request Actions 👻 History ?
Form Number 4483944 Purpose Procurement Request Status Incomplete	Supplier	Please select a fulfilment center below.	
Instructions	Search Registered S	Suppliers	
Suppliers 🗸	Supplier	Kuehr	
Attachments 🖌	Relationship	All	Report Action V History ? eter belon.
Form Fields 🛷	Zip Code	Within 5 Miles 👻	•
General Information 🛛 🛷			Clear Q Search
Item Information			
Review and Submit			
			Previous Next >

- 4. If multiple options click **Select** for the correct supplier from the list. Click **Next**.
 - a. If the supplier does not appear, send a W9 via Liquidfiles

(<u>https://liquidfiles.uwgb.edu/filedrop/alexandd@uwgb.edu</u>) to Danielle Alexander or intercampus mail to Purchasing. Supplier set up takes up to a week. **Do not email W9s or attach to ShopUW+.**

Shop uw+						
Shop + Shopping + View Forms						
Back to Shopping Home						
Requisition Wizard		Suppliers			Request A	Actions 👻 History 💡
Form Number 4483944 Purpose Procurement R	equest	Supplier	Please select a fulfilln	nent center below.		
Status Incomplete		> Modify Search				
Instructions						
Suppliers	~	Supplier Name		Doing Business As	Fulfillment Centers	Action
Attachmente	1					
Attucilitenta					CHK: (preferred)	Select
Form Fields	1				401 N QUINCY ST, GREEN BAY, Wisconsin 54301-4917	Select
Form Fields General Information	1				401 N QUINCY ST, GREEN BAY, Wisconsin 54301-4917 United States	Select



5. Attachments – Attach back up for the Requisition/PO as PDFs. Examples: quotes, service agreements, or invoices if available. **Do not attach a W9.** Click **Next.**

Shop un +			AI •
Shop + Shopping + View Forms			
Back to Shopping Home			
Requisition Wizard		Attachments Request Actions 👻 History ?	
Form Number 4484141 Purpose Procurement Status Incomplete	l Request	Please add your attachments below.	
Instructions			
Suppliers	~		
Attachments	~		
Form Fields			
General Information			
Item Information	~	Add Attachment	
Review and Submit		•	
		Attachment * No File Attached Lucios	
		* Required Save Changes Close	

6. Click Next on the Form Fields Page.

Form Fields – General Information Page

Shop un +		
Shop 🕨 Shoppin	g 🕨 View Forms	
Back to Shopp	ping Home	
Requisition	n Wizard	Form Fields - General Information Request Actions
Form Number Purpose Status	4484141 Procurement Request Incomplete	★ Response is Required
		✓ General Information
Suppliers		What are you trying to procure? *
Attachments		· · · · · · · · · · · · · · · · · · ·
Form Fields	~	
General Ir	nformation 🗸	What is the estimated value of the purchase? *
Item Information	rmation 🖌	○ 0-95.000 ○ 5.001-825.000 ○ 25.001-85.000 ○ 550.001+
		Is there competition (more than one supplier in this marketspace)? *
		⊖ Yes O No
		Is the supplier a state/federal agency? *
		⊖ Yes ⊖ No

- A. What are you trying to procure? Select either **Purchasing Good** or **Purchasing Service**. A good is a physical item. Nonphysical items are a service. Ex. A speaker presentation is a service whereas lab equipment is a good. Note: A software purchase would be considered a good, a software renewal would be a service.
- B. What is the estimated value of the purchase? Choose value.
- C. Is there competition (more than one supplier in this marketspace)? Click yes if any competition exists, click no if the item/service can only be provided by one specific supplier. Examples: There are several catering options in town, even though only Chartwells is allowed on campus, the answer is yes. A speaker might be the only one to provide that particular speech, but if other speakers provide a similar topic, the answer would be yes.
 - a. If the item/service is on a state contact then select yes.
 - b. The answer is no if:
 - i. The features/abilities of this good/service are unmatched and superior to other similar products/services



- ii. This good/service is only available from one supplier and no other similar items are available.
- iii. A grant award requires the purchase of a particular brand name good/service.
- iv. When a product has historic, artistic, or educational value, and/or viable specifications or standards cannot be determined.
- c. If the answer is no, go to <u>https://www.uwgb.edu/purchasing/forms/</u> and click on **Request for** Single/Sole Source Purchase fill out the form and email to <u>purchasing@uwgb.edu</u> prior to continuing the requisition. Attach the PDF of the approved waiver to the Waiver of Bidding section.
- D. Is the supplier a state/federal agency? Select yes if they are a state or federal department. Example: another UW campus, Wisconsin Department of Administration. Private sector companies that have contracts with the state are not state agencies.
- E. Do these goods or services require a payment at time of order placement (a prepayment, deposit, or cash with order)? No is the most common answer, if yes email <u>accountspayable@uwgb.edu</u> prior to submission with the amount of the prepayment and date requested. Prepayments should be submitted no later than one week in advance. Select Yes for checks due the date of service.
- F. If this supplier is on contract, please provide the contract number: Optional, if known enter state contract number.
- G. Read the statement and check box for I have provided the relevant documents or no documentation is required.
- H. Click Next.

Click Here for Purchasing Services Instructions

Click Here for Purchasing Goods Instructions



Form Fields – Purchasing Goods

Shop um +		
Shop + Shoppin	g 🕨 View Forms	
Back to Shopp	ping Home	
Requisition	n Wizard	Form Fields - Purchasing Goods Request Actions - History ?
Form Number Purpose Status	4484141 Procurement Request	★ Response is Required
		V Purchasing Goods
Instructions		Have goods already been delivered? *
Attachments	. ž	⊖ Yes 💿 No
Form Fields	~	
General In	nformation 🗸	I confirm that I am unable to procure this good from my campus surplus
Purchasin	ng Goods 🛛 🗸	⊖ Yes
Item Infor	rmation 🗸	
Review and S	Submit	Please visit your campus surplus prior to completing this form.
		Please indicate if your purchase is for tierns in the following categories: * Controlled Substances, Hazardous Materials, Radioactive, Rad Minor, Toxin, Lasers, Other Risky Goods Dicrese, Urmanned Aerial Vehicles, and/ or Drone / UAV Operation Annuel Of The AlBOYE Nonk Of The AlBOYE
		Please confirm that you have attached the relevant waivers or information related to your furniture request in the attachments page on this form, if it is applicable *
		If required documentation is not completed in accordance with the University / Campus policy, your department approvers or Purchasing will return this form to you for revision. *
		C Previous Save Progress Next >

- A. Have goods already been delivered? Select **No**. Our campus does not use the Non-Conforming Purchase Documentation Form.
- B. I confirm that I am unable to procure this good from my campus surplus Select **Yes** or **No.** Often surplus has many supplies, especially office supplies like paperclips.
- C. Please indicate if your purchase is for items in the following categories Select proper category and carefully read the next section.
- D. Please confirm that you have attached the relevant waivers or information related to your furniture request in the attachments page on this form, if it is applicable Check box for I have provided the relevant documents on the attachments page.
- E. Read the statement and check box for I confirm I have read & understood the university & campus policy relevant to my purchase and have attached the required documentation below.
- F. Click Next.

Click Here for Item Information Page Instructions

Click Here for Waiver of Bidding Page Instructions

Click Here for Pre-payment Page Instructions



Form Fields – Item Information

Note: This page allows for one item to be added. Additional items can be added on the Shopping Cart page. Instructions for additional items to follow.

Shop uw+								
Shop + Shopping + View Forms								
Back to View Forms								
Requisition Wizard	Form Fields - Item	Information					Request Actions 👻 🛛 H	History ?
Form Number 4493216 Purpose Procurement Request Status Incomplete	 Item Information 							
Instructions	User Defined Item							
Attachments	Unit Price		USD	Quantity		Total	0.00 USD	
Form Fields 🗸	Unit of Measure		~					
General Information 🖌 🖌	Product Description / Scope and Date of Services							
Item Information 🖌		1000 characters remaining						
Review and Submit	Manufacturer Name							
	Catalog No.							
	Commodity Code	-	Edit					
					<	Previous	Save Progress	Next >

- A. Unit Price Enter the price of the item.
 - a. If it will be invoiced as one order, you can enter the total of the order.
- B. Quantity Enter the quantity of items purchased. If using lot unit of measure, enter 1.
- C. Unit of Measure Select appropriate unit. Most common: each for individual items, or lot for an order total.
- D. Product Description / Scope and Date of Services First 30 Characters will appear in WISER. Enter a clear description that closely matches the quote/invoice. This will speed the payment process and help answer potential questions Accounts Payable may have.
- E. Manufacturer Name Optional
- F. Catalog No. Optional
- G. Commodity Code Click **Edit**. Select the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.
- H. Click Next.

Review and Submit

Click Add and go to Cart.

Note: See Saving a Form as a Template for instructions on saving a Requisition Wizard for use for similar purchases in the future to save time.

Shop uw+			
Shop + Shopping + View Forms			
Back to View Forms			
Requisition Wizard	Review and Submit		Request Actions 👻 History ?
Form Number 4498344 Purpose Procurement Request	✓ Required Fields Complete		
Status Incomplete		-	
Instructions	Section	Progress	
Suppliere	Suppliers	 Required Fields Complete 	
Suppliers 🗸	Attachments	 Required Fields Complete 	
Attachments 🖌	Form Fields	 Required Fields Complete 	
Form Fields 🗸			
General Information			
Purchasing Goods 🖌 🗸			
Item Information 🖌			_
Review and Submit			ŧ
			C Previous Add to Favorites Add and go to Cart 👻



Shopping Cart

1. Enter a short description in the **Name** section. Entering a name here will help you decipher between POs for the same vendor later and overall reduce searching time.

Shop um+						All 👻	Search (Alt+Q)	0.10 USD	A 💩 📷 🐻
Shopping Cart • 149189734 👻							= -	Assign Cart	Proceed To Checkout
Simple Advanced							Details		1 ~
Search for products, suppliers, forms, part number, etc.						Q 	DOLLY M JACKSON	N 52941.01	
KUEHN PRINTING LLC · 1 Item · 0.10 USD					-		•		
SUPPLIER DETAILS	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext Price	Add No	n-Catalog Item	ונ	0.10
E Requisition Wizard	outing its.	orzo, i uonuging	CHATTAC	quantity		… 🗆	-		
Purpose Procurement Request									
1 Test Item		EA	0.10	Qty: 1	0.10				
Commodity Code 19 Office Supplies, Related In	Q ems, and Services								
Capital Expense									

- 2. If you have additional items to add, click the **Three dots** to the right of the Supplier name.
- 3. Click Add Non-Catalog Item.
 - a. If you do not have additional items to add, skip to number 10.

Add Non-Cetalog Item		×
Existing Supplier		
KUEHN PRINTING LLC XQ KUEHN	(PRINTING LLC X	
Fulfillment Address	 Distribution Methods 	>
CHK 👷 - 401 N QUINCY ST, GREEN BAY, Wisconsin 54301-4917 United States		
Item		~
Description * Catalog No. Quantity * Price	Packaging	
254 characters remaining	EA-Each •	
Additional Details		>
Add Internal Attachments		~
Add Internal Attachments	ŧ	
* Required fields 🙎 Preferred	Save Save	And Add Another Close

- 4. Description First 30 Characters will appear in WISER. Enter a clear description that closely matches the quote/invoice. This will speed the payment process and help answer potential questions Accounts Payable may have.
- 5. Quantity Enter the quantity of items purchased. If using lot unit of measure, enter 1.
- 6. Unit Price Enter the price of the item.
- 7. Packaging Select appropriate unit of measure. Most common: each for individual items, or lot for an order total.
- 8. If you have additional items to add, click **Save And Add Another.** Repeat steps 3-6.
- 9. Once you have entered all the items, click Save.



UW+				All 👻	Search (Art+Q) 10.31 USD	⊘ ©
opping Cart • 148854997 •					🗄 🖶 Assign Cart Pro	iceed To Check
ITEM DETAILS Commodity Code Capital Expense	20 Q Paper, Printing Ecupment, and Related Products and Servic	es			Correct these issues. Shoppers may still assign cart to a Requester. Required: Commodity Code (Line 2) Required: Commodity Code (Line 3)	
Letterhead for Admissio	ns	EA	1.06 S EA	5.30 🗌	Details For DOLEN M JACKISON Nime 2021-09-17 00862941 01 1	
▲ ITEM DETAILS Commodity Code	Q @Required	-			Estimate (10.31 USD) Totak	10.3
Capital Expense						
Acceptance Brochures		EA	0.01 500 EA	5.00 🗌		
∧ ITEM DETAILS ▶						
Commodity Code	Q. © Required	-				

- 10. Enter the Commodity Code for added items Click **Magnifying Glass**. Select the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.
- 11. Click Proceed to Checkout.

Requisition

The Requisition page is where comments can be added to Purchasing, the business purpose and the funding string are entered and the final submission is done.

- 1. Click **Comments** tab
- 2. Click the **Plus Sign** to add a comment. If the PO is to be sent via email, add the supplier email address of where to send the PO. Add any notes Purchasing might need. This is optional.

UW+						All 👻	Search (Alt+Q)	0.10 USD 🗎	⇔ ⊧ ™ ,
equisition • 14918	9734 •						∃ ● ₽ Ø	Assign Cart	Place Order
Summary PO Preview	Comments Attachments History								
General	1	Purchasing Use Only		ø	Shipping & Billing Information	ø v		Draft	
Cart Name	Fall 2021 Acceptance Brochures	Buyer ID	no value		Ship To		Shoppers may still assign c	art to a Requester.	~
Description	no value	PO Clauses	View details		Attn: DOLLY M JACKSON Suite/Rm: CL730		Required: Business Purpo	se 🗲	
Prepared by	DOLLY M JACKSON	РО Туре	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING		Required: Account Required: Fund		
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States		Required: Department Required: Program		
Business Purpose	O Required	Bulletin Number	no value				Total (0.10 USD)		~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options				
					Chin Via Roet Carrier, Reet Way		Subtotal		0.10

3. Click Required: Business Purpose



4. Select the appropriate category from the **Drop Down**

p uw +		
tequisition • 149189734 •	Edit General	
Summary PO Preview Comments Attachments History	General	
Records found: 0	Cart Name * Fail	2021 Acceptance Brochures
No comments have been added	Description	
	Prepared by DOLLO	YM JACKSON
	Prepared for DOI	LLY M JACKSON Q
	Business Purpose *	
	Aca	idemic / Student Services
	OTHER Business Purpose	ility / Maintenance Purchase
	Business Unit Lab	oratory / Classroom
	Previous PO Number Offi	HER - please write in below ce Supplies (pens, copy paper, etc.)
	Receiving Required/Positive Approval?	
	New Fiscal Year	
	* Required fields	Save Close

5. Click Save.

Click Here for Multiple Funding Code Instructions

Single funding code entry

puw+							All 👻	Search (Alt+Q)	10.31 USD 👿	⊘ ⊧	0
Requisition • 14885	4997 -							= • •	Assign Cart	Place Ord	der
Summary PO Preview	Comments Attachments History										
General	ø	Purchasing Use Only		1	Shipping & Billing Information	on	ø v		Draft		
Cart Name	Test for Training	Buyer ID	no value		Ship To			Correct these issues. Shoppers may still assign	n cart to a Requester.		~
Description	no value	PO Clauses	1 View details		Attn: DOLLY M JACKSON Suite/Rm: CI 730			Required: Account	(
Prepared by	DOLLY M JACKSON	РО Туре	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING	3		Required: Fund Required: Department	•		
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States			Required: Program			
Business Purpose	Office Supplies (pens, copy paper, etc.) Office Supplies (pens, copy paper, etc.)	Bulletin Number	no value					Total (10.31 USD)			~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options			Subtotal		10.	.31
Business Unit	UW - Green Bay (UWGBY)	Offline Contract	no value		Ship Via Bet	st Carrier-Best Way				10.	.31
Previous PO Number	no value	Procurement Authority	Chapter 16		Requested Delivery Date no	value					

6. Click **Required: Account**.

Edit Funding String									×
Funding String									
GL Business Unit *	Speed Chart * 🗄	Account *	Fund * =	Department * 🗄	Program * 🗄	PC Business Unit	Project =	Class	
UWGBY 🖌	NONE_GBY	Search	Q Search	Q Search	٩	No Value	Search	Q Search	۹
		Required	Required	Required	Required				
4									,
Required fields								Save	Close

- 7. GL Business Unit Select UWGBY
- 8. Speed Chart Leave as NONE_GBY. This auto fills when UWGBY is selected for the GL Unit.
- Account 4-digit account number. Go to https://www.uwgb.edu/purchasing/shopuw/ and click on Common Account Codes for a list of common codes.
- 10. Fund 3-digit number from your funding string
- 11. Department 6-digit number. **All department numbers must be in format XXXXXX_GBY.** You must add the _GBY to the department number. Use the Magnifying Glass to select the department.
- 12. Program 1-digit number.



- 13. Project Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXX_GBY.** You must add the _GBY to the project number. Use the Magnifying Glass to select the project.
- 14. Class Only used by Athletics.
- 15. Click Save
- 16. Click Place Order
- 17. When invoices are received, email the invoice and any backup as a PDFs to <u>Accountspayable@uwgb.edu</u> and include the Requisition number or PO number. <u>Payments will not</u> <u>be processed if the invoice is not emailed to Accounts Payable.</u>



Multiple Funding Code Entry

vuw+						All 👻	Search (Alt+Q) Q. 10.31 USD 🗑	
equisition • 14885	4997 -						📃 👁 🖶 🔕 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History							
General	ø	Purchasing Use Only		ø	Shipping & Billing Information	ø	Draft	
Cart Name	Test for Training	Buyer ID	no value		Ship To		Correct these issues. Shoppers may still assign cart to a Requester.	~
Description	no value	PO Clauses	View details		Attn: DOLLY M JACKSON		Required: Account	
Prepared by	DOLLY M JACKSON	PO Type	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING		Required: Fund Required: Department	
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States		Required: Program	
Business Purpose	Office Supplies (pens, copy paper, etc.) Office Supplies (pens, copy paper, etc.)	Bulletin Number	no value				Total (10.31 USD)	~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options		Subtotal	10.31
Business Unit	UW - Green Bay (UWGBY)	Offline Contract	no value		Ship Via Best Carrier-Best Way			10.31
Previous PO Number	no value	Procurament Authority	Chapter 16		Requested Delivery Date no value			

1. Click Required: Account.

Edit Funding String										×
Funding String										
GL Business Unit *	Speed Chart * 🗄		Account *	Fund * =	Department * 도	Program * 🗄	PC Business Unit	Project 🗄	Class	
UWGBY 🖌	NONE_GBY	¥.	Search Required	Q Search Required	Q Search © Required	Q C Required	No Value	Search	Q Search	۹
4										•
* Required fields									Save	Close

- 2. GL Business Unit UWGBY
- 3. Speed Chart Leave as NONE_GBY. This auto fills when UWGBY is selected for the GL Unit.
- Account 4-digit account number. Go to <u>https://www.uwgb.edu/purchasing/shopuw/</u> and click on Common Account Codes for a list of common codes.
- 5. Fund 3-digit number from your funding string
- 6. Department 6-digit number. **All department numbers must be in format XXXXXX_GBY.** You must add the _GBY to the department number. Use the Magnifying Glass to select the department.
- 7. Program 1-digit number.
- 8. Project Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXX_GBY.** You must add the _GBY to the project number. Use the Magnifying Glass to select the project.
- 9. Class Only used by Athletics.
- 10. Click Save
- 11. Scroll down to the item that has a different funding code from the one entered above.
- 12. Click on the Three Dots on the right of the price for that line

Sha	γ υ ₩+							All 🕶	Search (Alt+Q)		10.31 USD 🗎	0 k	1
	Requisition • 148854997 •								\equiv		Assign Cart	Place Orde	er
	Summary PO Preview Comment	ts Attachments History											
	Contract no val	ue	P0 Number T	o Be Assigned				·		(100)	Draft		
	Quote number no val	ve							Subtotal	(030)		10.3	31
	Item		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	_				10.3	31
	Contract:	to value							What's next	for my order? Wait for Vali	dation Response		~
	1 Posters for Orientation			LO	0.01	1	0.01		Approvers	There are no	approvers		
	Asset ID	no value		Internal Note	no value Add			Override Supplie Ship To	r i	Show skipped step	ps	C e	2
	Commodity Code	× 20 / Paper, Printing Equipment,	and Related Products and Servic	External Note Attachments for supplier	no value Add			Delivery Bill To Credit C	y Options	raft ^{ctive} OLLY M JACKSON			
	2 Letterhead for Admissions	no tano		EA	1.06	5 EA	6 5.30	Funding	g String	Parallel Steps			



- 13. Click Funding String in the Override menu.
- 14. Click on the Account/Fund/Department/Program or Project to change
- 15. Change the funding to the new funding string.

Override Line 1: Funding S	String								×
				·····*E	•	E	autor Ta	J. J. L	
UWGRY	NONE GRY	2620	Fund *	AD0316 GBY	Program ~	No Value	Project ==	Q Search	0
4								+ -	× •
★ Required fields								Save	Close

- 16. Click Save.
- 17. Repeat for any additional item lines that need new funding entered.
- 18. Click Place Order
- 19. When invoices are received, email the invoice and any backup as a PDFs to

<u>Accountspayable@uwgb.edu</u> and include the Requisition number or PO number. <u>Payments will not</u> <u>be processed if the invoice is not emailed to Accounts Payable.</u>



Form Fields – Purchasing Services

ShopUW+	
Shop + Shopping + View Forms	
C Back to View Forms	
Requisition Wizard	Form Fields - Purchasing Services Recent Action - History 7
Form Number 4490744 Purpose Procurement Request Statua Incorrolate	★ Response is Required
Instantions	V Purchasing Services
instructions	Have services already begunt *
suppliers 🗸	⊖ Yes O No
Attachments 🗸	
Form Fields 🗸	An Annual to be well to be an a second device with a second s
General Information 🖌	can ore service de provideo by an on campos department? ~ 0
Purchasing Services 🗸	⊖ Yes O No
item information 🖌 🖌	
Review and Submit	Will the device provider have access to student information, Protected Health Information, or data classified as high or medium tok according to University policies)*
	⊖ Yes ⊖ No
	Is your requested service any of the following? *
	C) michano, Nanach, a Other Audure, Breisen Ungel Reveal Organization States
	If separate documentations and completed is association with the laterativity Company parks guid department approvers an Rectinating will instan this from to you for memory. <u>Related at and the default of the documentations on the attribution to be attributions and attributions</u> .
	C Pervious Buret Progress Next 3

- A. Have services already been begun? Select **No**. Our campus does not use the Non-Conforming Purchase Documentation Form.
- B. Can the service be provided by an on-campus department? Select Yes or No.
 - a. Chartwells does not count as a on campus department.
 - b. If yes, explain why the campus was not used.
- C. Will the Service provider have access to student information, Protected Health Information, or data classified as high or medium risk according to University policies? Select **Yes** or **No.**
 - a. If yes, Read the statement and check box for I have provided the relevant documents or no documentation is required.
- D. Is your requested service any of the following? Select the appropriate category and carefully read the following statement.
- E. Is this supplier an individual or sole proprietor? Select **Yes** or **No.** If No, skip to H.
- F. Is this person a current or former employee of the UW System? Select No. Currently employees, or previous employees that were employed during the current fiscal year, of any UW System Campus must be paid through HR. Purchasing/Controller's Office will inform you at the time of supplier set up if they are a current or former employee.
- G. Go to <u>https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/utilization-of-independent-contractors/#policy</u> and scroll down to number 7. Related Documents and click SYS 236 Appendix 1. Fill out the form but leave the social security number blank. Attach the PDF of the form to the attachments page. If the form states to treat the supplier like an employee, payment must go through HR and can not be processed through ShopUW+.
- H. Click Next.

Click Here for Item Information Page Instructions

Click Here for Waiver of Bidding Page Instructions

Click Here for Pre-payment Page Instructions

Click Here for Instructional, Research or Other Academic Services Page Instructions



Form Fields – Waiver of Bidding

If you selected that there is no competition on the General Information page, you will get the Waiver of Bidding screen after the Purchasing Goods screen. Prior to completing the Requisition Wizard, contact Purchasing for the proper waivers and approval.

Note: if your purchase is under \$5,000, no waivers are needed. Read the page and click Next.

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- A. Read the statement and check box for I have read and confirm the above.
- B. What type of exemption are you requesting?
 - a. Single Source The features/abilities of this good/service is unmatched and superior to other similar products/services
 - b. Sole Source Request This good/service is only available from one supplier and no other similar items are available.
 - c. Grant Exemption A grant award requires the purchase of the brand name good/service.
 - d. Payment to Other Wisconsin State Agency or Utilities The supplier is a WI State Agency (ex. Department of Admin, another UW Campus) or utility
 - e. Intrinsic Value When a product has historic, artistic, or educational value, and/or viable specifications or standards cannot be determined.
 - f. Emergency (Public Health, Safety, or Welfare) When the risk of human suffering or substantial damage to state real or personal property exists that requires immediate action <u>contact your</u> <u>campus Purchasing office immediately, prior to continuing with this requisition</u>
 - g. Substantial Time Pressure Note that time pressure must be beyond your control and does not include administrative delays or confusions in the purchasing process.
- C. Prior to completion of this requisition, contact Purchasing for waiver approval.
- D. Fill out the remaining questions. Use the description from the waiver approved by Purchasing.
- E. Attach the PDF of the waiver signed by the Purchasing director.
- F. Click Next.

Click Here for Item Information Page Instructions

Click Here for Pre-payment Page Instructions

Click Here for Instructional, Research or Other Academic Services Page Instructions



Form Fields – Prepayment

Note: You must email <u>Accountspayable@uwgb.edu</u> with the requisition number, amount, and date prepayment is due.

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- A. Please specify the amount of the initial pre-payment. This is the amount of the pre-payment needed. Payments for services due at the time of service/event should be entered for the full amount.
- B. Please confirm that you have attached the documentation that would support your pre-payment request in the attachments page on this form Check box for I have provided the relevant documents on the attachments page.
- C. Click Next.

Click Here for Item Information Page Instructions

Click Here for Instructional, Research or Other Academic Services Page Instructions



Form Fields – Instructional, Research, or Other Academic Services.

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- I. Is the service for a credit or non-credit course? Select Credit, Non Credit, or Does Not Apply.
- J. Who is the audience? Select **Staff, Faculty, Students, or None of the above.**
- K. Carefully read the statement and check any boxes if necessary.
- L. Click Next.

Click Here for Item Information Page Instructions