Agenda

- ABA Deadlines
- Procurement Tips & Tricks
- New Buyer Assignments
- Announcements

ABA Deadline Reminder

- ABA Deadline is TODAY, Friday September 4th for FY20

- All ABAs should be processed and approved online to be received by the Budget Office by 5:00 pm

- Hard deadline in order for us to close and roll Budget in Mid-October

  - *ABAs submitted on Tuesday will be assumed to be for FY2021. If any 2020 ABAs have not received approval by EOB today, please let us know

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Procurement Hints and Tips

- Requisition Information – to expedite the processing of your requisition, please include the following information in the Requesters Justification

	Justification Comments	
Required	**Item**	**Notes**
Required	Department contact	Full name, phone number and email address
Required	Vendor contact	Full name, phone number and email address
Required	Purpose	What is it for? Why is it being purchased?
Required	Email Address	Where do we need to send the order?
Required	Procurement Method	Must be referenced (coop, contract, quotes)
Required	Service Date	When do need services performed or good received by?
	Supporting Documentation	
If applicable	Quotes	Attach all quotes
If applicable	Contract	If this purchase is made off an existing contract, attach copy of contract
If applicable	Previous PO number	What was the previous PO number? This helps with reporting
If applicable	Proprietary/Sole Source form	Must have VP or dept chair signature
If applicable	Request for Solicitation form	Attach for formal solicitations
If applicable	Conflict of Interest form	Attach when reporting COI
If applicable	Emails	Additional information on purchase/contract

Procurement Hints and Tips

A **couple other helpful hints to consider when entering requisitions:**

- **If you have new software you are purchasing**, you should obtain IT compliance PRIOR to submitting the requisition. This will result in minimized delays as this compliance is required to be routed through the various approvals. This also applies to any renewals that did not have IT compliance approval previously.

- **Contract timing** - A fully approved requisition is required before contracts can be signed. When submitting contracts for the procurement of goods and/or services, please submit the requisition and unsigned contract well in advance to allow sufficient time (30-45 days) for review and processing of the appropriate legal signatures after the agreement has been reviewed for legal sufficiency.

- **If a service starts while the requisition/contract is being reviewed/processed**, the contract will require additional processing due to the modifications that will be needed.

Procurement Hints and Tips

A **couple other helpful hints to consider when entering requisitions:**

- **Will there be multiple invoices coming in for this requisition?** If yes, ensure the Amount Only button is flagged

- **Is the requisition meant to be single year or multi-year engagement?** Please note this in the justification comments so Procurement can ensure the requisition and corresponding PO are setup accordingly.

- **Blanket orders are single year engagements** – these POs do NOT roll

- **When requesting quotes from vendors, please be sure to give them Central Receiving address for your campus** for goods, unless it requires special handling due to size. This will ensure the delivery routes through Central Receiving and is tagged if appropriate.

Procurement: New Buyer Assignments

- It was determined a department based buyer assignments would provide the greatest value

  - Each Department will have a primary buyer – (Buyer Assignment Spreadsheet)

    - Spreadsheet can be found https://budget.unt.edu/documents

- Requisitions initiated in EIS will be routed to the appropriate purchasing professional based on the department used

- This will not change how departments enter requisitions nor will it change how you inquire into EIS regarding your requisition status.

Announcements

Budget Override Request

- FY 2021 budget has been loaded
  - IF you receive a budget error for a requisition using a fund that has budget loaded for FY 2021; we will ask that you complete an ABA to reallocate funds instead of generating a budget override.

- FY 2020 balance roll forwards will occur in mid October
  - If you receive a budget error for a requisition using a fund that is part of the balance roll forward please determine your balance before requesting an override.
  - To determine your balance, add your FY20 ending balance to your current FY21 balance

Announcements & Reminders

Budget Trainings

- Budget Office will have new virtual trainings available this semester. Check the Training Calendar on the UBO website or log onto UNT Bridge for more info.
  - Trainings include:
    - Budget Basics
    - ABAs
    - COGNOS
    - Payroll

Thank You!