Why is my requisition taking so long to be approved by Procurement?

The single most common reason a requisition gets delayed in being approved by Procurement is that some information is incorrect in the requisition and/or incorrect with the related paperwork. Here are some examples of common issues with the requisition:

1. The requisition has not been approved by the department. If not, the requisition does not show up on the Procurement work lists.
2. The correct account code is not being used.
3. Does the requisition correctly reflect the quote (for example: unit of measure, quantities, price, etc.)?
4. Is the description complete (including quote numbers, dates of service, part names and numbers, etc.)?
5. Does the order require paperwork to be sent to Procurement? If not, please do not send it. We often get overrun with quotes or other paperwork that we do not need. If in doubt go to our website. [http://www.umass.edu/procurement/]
   Select “Training & Support/Purchasing Requirements/Processing Requirements for Purchases”. (This is the document WE use when we are reviewing your requisitions.)
6. Is a contract vendor bring used? If the quote is from a contract vendor, has the vendor referenced contract pricing on the quote? If not, have them send you a new quote. Believe it or not, some vendors may only offer contract pricing if asked… it is up to you to ask for it.
7. If a contract for services (CFS) is required, is it filled out correctly and completely? Is the current version of the contract being used? Have the appropriate people signed the contract? Are attachments needed to the contract and have they been referenced correctly on the contract? Delays result when we have to return contracts for do-overs. Our CFS is available at our web page and can be filled out and sent electronically to the vendor to save up to 1-2 weeks of processing time.
8. The higher the dollar amount of your requisition, the more approvals it may need. Large dollar contracts for services (over $50,000) may have to go through a legal review, and get signatures from officials such as a Vice-Chancellor, Provost, Chancellor or President. This takes time, so planning ahead is important. Again, see Processing Requirement for Purchase on our website for the approval flow at certain dollar amounts.
9. Increased workload. At certain times of the year, the number of requisitions increases dramatically. Add to that any of the issues described above, and the requisition may take days, or in rare cases weeks longer.

Buyers place notes in the comments of requisitions when there are issues and/or at what stage of the process your requisition is in. Please check for these notes for updates.

If you have a situation where special handling is required, please call your buyer in Procurement. Buyer assignment listings are located on our website: [www.umass.edu/procurement] If we know ahead of time about something that needs to be expedited, we can work together with you to shepherd it through the system and try to meet your needs.
The Temporary Help Services Contract effective January 1, 2012 MHEC-MC12-J03 is different from the contracts we have used in the past in that it was awarded to one vendor statewide. This vendor is The Resource Connection, Inc. (UMass Vendor #0000017259) and they are responsible for monitoring and managing a series of sub-contracted temporary services agencies.

The local vendor for UMass Amherst is Johnson & Hill (a SDO certified woman-owned business) in Springfield and Northampton. This is the same vendor that has held the contract for the past several years so the transition will be smooth.

Frequently Asked Question: What happens after the Job Request/Statement of Work is requested? You will receive a response that your request has been received.

- Johnson & Hill will send candidate’s resumes to The Resource Connection (TRC) based on our needs.
- The resumes/responses will be sent to the UMass requesting department for review and selection from TRC.
- TRC will coordinate interviews, employment screen, etc. from the UMass requesting department as indicated on the Statement of Work (SOW).
- Once a selection is made, TRC will complete the placement record and execute the SOW with the UMass requesting department.
- Once you select the desired candidate you will need to enter a requisition into the PeopleSoft Financial System so a purchase order can be generated and sent to TRC. Note: the requisition and purchase order will be to The Resource Connection and NOT Johnson & Hill or any other sub-contracted temporary services agencies.
- Once the staff is hired, you will receive an e-mail each week that contains an electronic time card for approval from The Resource Connection, Inc.

For additional information on this contract and others, please go to the Procurement website at: www.umass.edu/procurement.

Seal the Deal with UMass Print Services

Print Services is proud to announce our newest piece of equipment—a Heat Seal commercial grade laminator! Boasting a maximum width of 12.5 inches, and needing just a few minutes to warm-up, we now have the ability to laminate a wide range of products while you wait. You’ll be amazed how rich and vibrant printed colors look once laminated. And nothing beats laminating when you are looking for the ultimate protection of important documents. Stop in today and let us “seal the deal” on your posters, flyers, ID cards, Photos and more!
**Cyber Data Security Requirements for Technology Purchases**

Any technology purchase that is used to collect, store or transmit personal information or used to process credit card transactions requires additional reviews and safeguards to ensure that the purchase is in compliance with all state, university and federal regulations.

Massachusetts General Law 93H (M.G.L. 93H) defines personal information as an individual’s first name or first initial, and last name in combination with one or more of the following:

- State-Identification Card Number
- Social Security Number
- Driver’s License Number
- Credit, Debit, or Financial Account Number (with or without a security code, access code, personally identifiable identification number or password).

Personal information protections also extend to data about students and staff as defined by FERPA. A good tutorial on FERPA is available on the OIT website at [http://www.oit.umass.edu/sites/oit.umass.edu/files/2011/07/06/tutorial.pdf](http://www.oit.umass.edu/sites/oit.umass.edu/files/2011/07/06/tutorial.pdf)

Departments should carefully review software system contracts, software licenses and/or subscriptions to determine if the product collects stores or transmits personal information (PII), FERPA information or processes credit/debit card for terms that relate to Data Security. This includes those contracts, licenses or subscriptions that may not require a purchase order. Contact a Buyer in Procurement with concerns and if warranted the Buyer can provide you with a Data Security Amendment to be initialed by the department and vendor and incorporated into the license agreement. The Data Security Amendment establishes the University’s Data Protection Controls and Breach Notification requirements.

Anytime a Department would like to accept credit cards, the Department must contact the campus eCommerce representatives in Administrative Systems for A&F to discuss options and requirements around Payment Card Industry Data Security Standards (PCI-DSS) before a purchase order is issued. PCI-DSS is an information security standard that relates to credit card cardholder information from debit, credit, and POS cards. The standard was developed by the credit card industry and all banks, including the University’s bank, require that their customers adhere to these standards to reduce fraud and protect cardholder personal information. It is University and Campus policy that an eCommerce representative needs to review and approve any activity involving credit cards to ensure that the system meets the PCI DSS standards, are certified as compliant, and the department is adhering to all PCI requirements. This additional review is critical since both the University and the other party are responsible for the security of the cardholder data. The eCommerce Manager will require the Data Security Amendment referenced above with additional PPCI DSS security requirements be incorporated into the license or purchase agreement.

**Reminder:**

**If you have a Xerox copier, please submit your change requests adding FY’13 lines onto your existing Xerox purchase orders.**
Things are always changing. Whether you have just joined the University or have been here for a long time, it is helpful to stay on top of changes big and small in Procurement.

The Procurement Department in conjunction with Workplace Learning and Development (WL&D) will be conducting a workshop on Thursday, November 8, 2012 from 9:00 to 12:00. This session is one of two sessions that make up the Financial Transactions Certificate Program. Participants will learn:

- An overview of the Procurement Department’s functions and responsibilities.
- Purchasing procedures.
- Contracts and Contracts for Services.
- How to navigate and locate resources on the Procurement web-site.
- Print and Mail Services

Opscan Services personnel are always available during standard UMass working hours to answer any questions you may have about exam preparation, scoring options and suggested formats for surveys. Several departments have ongoing yearly surveys which utilize their own custom forms and scoring/compiling programs. All university departments are encouraged to develop their own surveys and the processing programs needed to produce results which meet their specific needs. Our knowledgeable personnel can connect you to the right people to design and produce surveys compatible with our equipment and your specific needs. We can process those surveys for you, either on a one-time or continuing basis. We also score and provide results for early-semester basic skills tests for several departments.

All University of Massachusetts departments and programs are invited to utilize our time-saving services. We have an excellent reputation for quick and accurate processing, report preparation and turn-around times.

Opscan Services is open and available to provide these services all year round. We are available and prepared to process exams and surveys for any of the Summer Inter-Session classes. Please contact us if you need more information.

Opscan test/survey forms may be brought to the service desk of Print Services at 130 Whitmore Administration Building anytime between 8:30 am to 5:00 pm—Monday through Friday. You may bring us your exams/surveys or you may call us at 545-3071 or through Print Services at 577-9500 and we will arrange to have your paperwork picked up by UMass Distribution Services, which picks up your exam papers and securely brings them to us for processing.

**Opscan Services through Print Services**

Opscan Services is a campus service which can be utilized by any campus department or associated group which has a need to score or compile a multiple-choice or true-false quiz, exam or survey. We utilize an OPSCAN 10 high speed scanning machine. We can process several thousand sheets per hour. Print Services has many years of experience processing various types of Opscan/Scantron “fill-in-the-bubble” type forms.

Our standard test form is a green 200-question answer sheet. This form is available through Print Services (for a small fee) as are the Header Sheets (free) necessary for every test scored. The green 200-question form can be used for all exams and some surveys.

Workshop on the Procurement Department through WL&D

**Save the Date!**

**Thursday, November 8, 2012!**

**Workshop on the Procurement Department offered by WL&D.**

**Sign up today!**

Registration is available on the WL&D Web-site at: [www.umass.edu/wld/registration.php](http://www.umass.edu/wld/registration.php)

*This session is not just for new hires. Please consider joining us.*
If you make purchases from Apple or Dell, please visit the Procurement Department website to view changes and clarifications to these two contracts. Go to http://www.umass.edu/procurement/commcont.html and scroll down the page until you see “Computer Purchases—Apple & Dell”.

**Highlights:**

- Effective immediately and until further notice, all purchases of Apple products for the Amherst Campus that are made directly to Apple will be made through MHEC Contract MC11-F05. Note that you must reference MC11-F05 on your requisition. Purchases of Apple products made through the University Store / Follett—will reference Campus Contract 12806.

You may use either contract—the prices are the same. Please view http://www.umass.edu/procurement/contracts/apple.html (Apple Computers) at our website for detailed information about the two contracts, which includes changes that Apple has made in the past six months to their terms and conditions and access to Apple pricing.

- Dell has offered a clarification to the differences in the pricing/warranties between the USave Contract and MHEC MC11-F05. See “Computer Purchases—Apple & Dell at our website for more information. Simply go to: http://www.umass.edu/procurement/commcont.html

- Warranty and repair service for Apple and Dell products is available through OIT. Contact hardware support at 545-2036, or visit their website at: http://www.oit.umass.edu/hardware/computer-maintenance-repair-services for additional information.

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**Pardon Us**

“If you find mistakes in this publication, please consider that they are there for a purpose. We try to print something for everyone and some people are always looking for mistakes.”

(quoted from a weekly paper in Clermont, Florida)

For the latest updates, please visit us on the web at: http://www.umass.edu/procurement