



UNIVERSITY OF MASSACHUSETTS DARTMOUTH PROCUREMENT MANUAL

Section 2.2 – Requisition Approval & Return Policy

1. **Returning Requisitions:** The Procurement Office strives to efficiently manage the flow of requisitions that require procurement approval so as to expedite their approval and the distribution of purchase orders. To this end, the procurement office strives to either approve a requisition or request any additional information that is required to approve it within three (3) business days following receipt. To expedite the approval process departments must provide the documentation requested by Procurement in a timely manner. In order to efficiently manage timely work flow within BuyWays and effectively manage clear communication between all levels of approval within the BuyWays system, it may be necessary from time to time for Procurement to return a requisition to the requisitioner. Procurement will generally return requisitions under the conditions listed below or other similar circumstances:
 - A requisition which cannot be processed because it does not comply with Federal or State Law or regulations, Board of Trustee Policy or other University Policy.
 - A requisition which was submitted without the necessary information to approve it and three (3) business days have passed from the time that the information was requested by Procurement from the Department with no response or without the necessary information.
 - A requisition which was not submitted in the correct format or requires other changes that must be made by the Department.
2. **Entering Requisitions:** In order to authorize the expenditure of funds through the requisition approval process in BuyWays, the requirements outlined within this section must be met. Once these steps have been completed the requisition will be approved and a purchase order will be issued to the vendor.
3. **Accurate Requisition:** A cart must be entered into the BuyWays Procurement System by the originating department which meets all policies, guidelines and requirements as set forth in this manual and any additional BuyWays requirements as outlined the BuyWays User Guides. This includes, but is not limited to, use of correct account and commodity codes, correct structuring of requisitions by line item and inclusion of all required internal/external documentation i.e. quotes, contracts, awards, etc. The cart must then be submitted as a requisition which meets all applicable requirements.
4. **Initial System Validation (Budget Check, etc.):** When submitted, a requisition goes through an initial validation process which includes a budget check to ensure that there are sufficient unencumbered funds available for the purchase. If the validation fails due to insufficient funds or for any other reason, the requisition will be returned to the requisitioner and an automated email from “SciQuest” will be sent to the requisitioner which provides the reason that the requisition was returned.
5. **Department Approval:** The Budget Authority, or his/her authorized designee, must electronically approve the requisition within BuyWays workflow within the “Department Approval” section.



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6. **Fund Approval:** If an acquisition is off of a federal, state or other agency grant or contract resulting from such a grant, “Fund” approval is required within BuyWays from the Sponsored Projects Administration office (SPA). *It is suggested that department’s entering requisitions that require SPA approval communicate/coordinate proactively with SPA to verify that all required documentation is complete so as to expedite the “fund” approval of their requisition.
7. **Commodity Approval (within BuyWays):** If the commodity for which the requisition is being entered requires additional approval, than the assigned commodity approver must electronically approve the requisition. Requisitions with commodities that require commodity approval are automatically routed to the assigned commodity approver based on the commodity code that the shopper or requisitioner assigned to the requisition. Examples of items requiring commodity approval include but are not limited to Furniture, IT Hardware & Software, Labor and Construction, Contracts for Services, etc.
8. **Commodity Approval (outside of BuyWays):** Although rare, from time to time commodities may require some type of special approval which is not built in to BuyWays, in this case, Procurement will reach out to the appropriate individual or department to obtain their approval or will contact the originating department if the request for approval must come from the originating department.
9. **Procurement Approval:** Once a requisition has completed all intermediary approval phases, the second to last step is Procurement Approval which is the review of the requisition for compliance to State, Federal and Board of Trustee policy by the Procurement Department. This is the second to last step prior to a fully authorized purchase order being issued to the vendor. *Based on dollar value and commodity type, some small dollar requisitions for common commodities do not require Procurement Approval and become a purchase order as soon as they receive department, fund or commodity approval.
10. **Final System Validation (Budget Check, etc.):** Once a requisition is approved by Procurement it must pass a final system validation check at which time if it passes it becomes a purchase order and if it does not than it is returned to the requisitioner.