

# Unified Procurement Services Team (UPST)

**Boston F&A Meeting**

**April 9, 2024**



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

# Agenda

- Payment Options for Individuals (Domestic & Foreign)
- Buddy, Your New Virtual Assistant!
- Fiscal Year End
- Invoice Approval Workflow Feedback

# Recipient Select+ Payment Options for Individuals *(Domestic & Foreign)*

# Recipient Select Plus for Individuals (Domestic & Foreign)

**WHAT:** UMass is implementing a new way to pay individual suppliers through a platform called **Recipient Select Plus, RS+**. This platform gives the supplier the power to choose how they would like to receive payment: Zelle, PayPal or US ACH. *Note this will be triggered when UMass issues a payment to the supplier.*

**HOW:** Multiple electronic payment opportunities (including digital payments) will be available:

Supplier Type (Individual)	Payment Options*	Payment Term
Domestic	Zelle, PayPal or US ACH	NET30
Foreign	PayPal	NET30

*\*Non-RSP+ related payment methods do not have same favorable terms for example, manual checks has a NET45 term.*

**WHEN:** Go-live is targeted for the beginning of May.

***Coffee with UPST is scheduled for Thursday, April 25<sup>th</sup> – be on the lookout for an invitation this week!***

# Buddy, Your New Virtual Assistant!

# Whooo is Buddy?



Buddy the Owl is your new virtual assistant!

Launched **Wednesday, April 3<sup>rd</sup>**, Buddy appears at the bottom right-hand corner of the UPST website.

Leveraging information on the UPST website, Buddy can answer questions and provide relevant resources for your procurement needs 24/7.

Buddy is always learning and improving, so the more you interact, the better Buddy gets!

*See the type of questions  
Buddy can answer!*





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## Unified Procurement Services Team



# Fiscal Year End



# Year-End is Near!

The end of FY24 is fast approaching, which means it's time to kickstart your planning process early! Check out some tips below to ensure your department is well-prepared to successfully close out the fiscal year:

- Review all open POs, contract requests, and supplier requests
- Submit supplier invoices as they come in
- Start any new contract request process
- Submit your supplier request
- Allocate/reallocate bank card transactions

*Be on the lookout for May & June Coffee with UPST invitations for “How to Close Out the Fiscal Year”!*

# Invoice Approval Workflow Feedback



# Workflow Criteria

## Who approves the invoice?

All Requisitioners have been assigned the **Invoice Approval** role.

If you are the PO Owner, you are assigned to approve the invoice after the Accounts Payable (AP) team has created the voucher in BuyWays.

The PO Owner can forward the invoice to another person in BuyWays, making them the new Invoice Approver on the invoice.

## Will this apply to all invoices?

No, below are list of purchases that **do not** require an invoice approval workflow step:

- Invoices less than \$1,000
- Grant-related
- Catalog orders
- Direct payments
- Recurring payments for Leases/Rentals

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