

Boston F&A Meeting

January 16, 2024



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law

Agenda

- Project Met 3.0
- Invoice Approval Workflow



Project Met 3.0

Benefits, Key Dates, and Changes to the Guided Buying Form



End User Benefits: What's changing?

Component	Current State	Future State
Automated Contract Amendment Process	<ul style="list-style-type: none"> Unclear amendment templates Must re-enter the same information from the template into the contract request form Contracts (original and amended) not linked appropriately 	<ul style="list-style-type: none"> Auto populated original contract information when amendment is initiated using amendment form Eliminates contract amendment templates (except for language/scope change amendments)
General User Experience Updates	<ul style="list-style-type: none"> Required questions and answers not being enforced Unclear questions and help texts Using language that is too procurement focused Too many templates 	<ul style="list-style-type: none"> Enforcement of fields marked as required (i.e., finance section) Additional and updated help texts Improved questions clarity (rewording) Updated job aids, resources, and contracts website
Contract Dollar Threshold Change for Services	<ul style="list-style-type: none"> Services up to \$50K can be put through a PO with supporting documentation (quotes) 	<ul style="list-style-type: none"> Services up to \$100K can be put through a PO with supporting documentation (quotes or bidding documents) Updated BuyWays Services forms and Competitive Procurement Reference Guide
New Commodity Code Structure	<ul style="list-style-type: none"> Not currently captured in the contract request form or contract 	<ul style="list-style-type: none"> Added as a question field for users to choose the appropriate commodity code

Blackout Period & Gatekeepers

During the **blackout period**, the submission or approval of new or incomplete contract requests will be temporarily unavailable.

Our primary objective during this period is to clear existing contract requests to ensure that this update does not impact you, our stakeholders, negatively.

Blackout Period: Monday, January 22 – Friday, January 26, 2024

Exceptions will only be made for contracts that are an emergency (environment, health, and safety of the campus).

1. Email upst@umassp.edu with details about your need.
2. UPST will pass along the information to your campus gatekeeper for them to determine if it is a true emergency.

Campus	Gatekeeper
UMass Boston	Darryl Mayers

Key Activities & Dates

- **Coffee with UPST**: Thursday, January 18, 2024, at 11am
- **Last Day for Campus Contract Request Approval**: Friday, January 19, 2024, at Noon
- **Blackout Period**: Monday, January 22 – Friday, January 26, 2024
- **Training Sessions**: Monday, January 29 – February 15, 2024
- **Updated Contract Process Go-Live**: Monday, January 29, 2024

Always visit [project website](#) for the most updated information

Invoice Approval Workflow



Invoice Workflow Background & Goals

Background

- Invoices currently may be paid without approval where departments are not leveraging electronic invoice workflow.
- Late payments and slow processing time are caused by departments holding invoices on campus for manual signatures.
- Invoice workflow is also a crucial step to further leveraging BuyWays features.
- This initiative was addressed initially before but approach for implementation has been updated as departments have not been responsive.

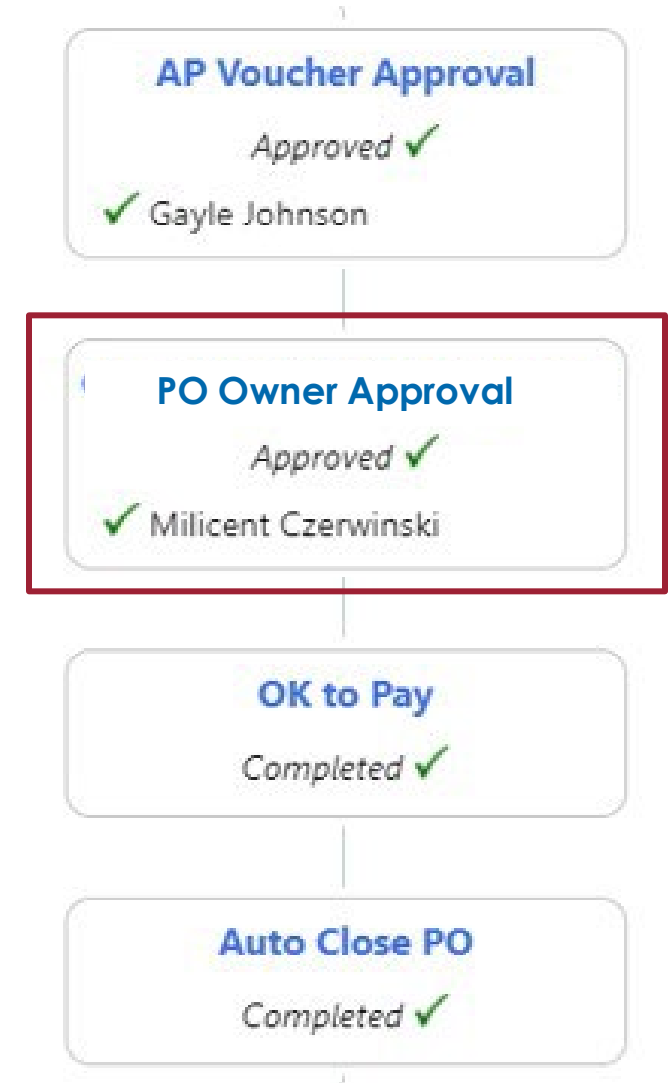
Goals

- Remove insistence of some dept to have the invoice sent to them first.
- Invoice Workflow will assist with the University's PO compliance issue.
- Minimize payment issues, duplicate submissions, etc.

Invoice Workflow Project Overview

- Identifying the number of requisitioning departments by campus that do not have electronic workflow.
- Developing rollout plan targeting completion in FY24, Q3/Q4, via phased approach
- Evaluate invoice threshold set for invoice review & approval
- Piloting changing departments without electronic workflow to PO Owner.*

*PO Owner Workflow Role - When invoices are entered by Accounts Payable, they become assigned to the person who is the PO Owner on the PO.



upst@umassp.edu

