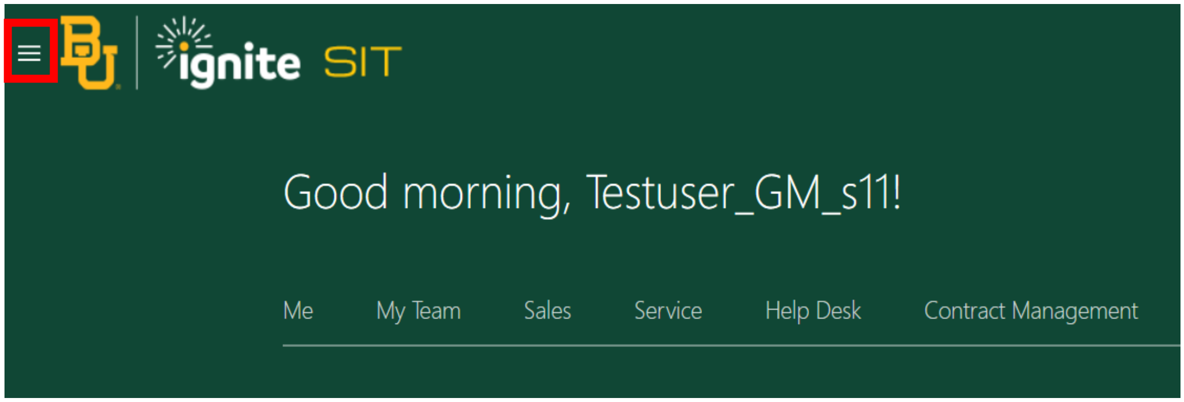
PROCUREMENT: After the Fact Requests

Overview

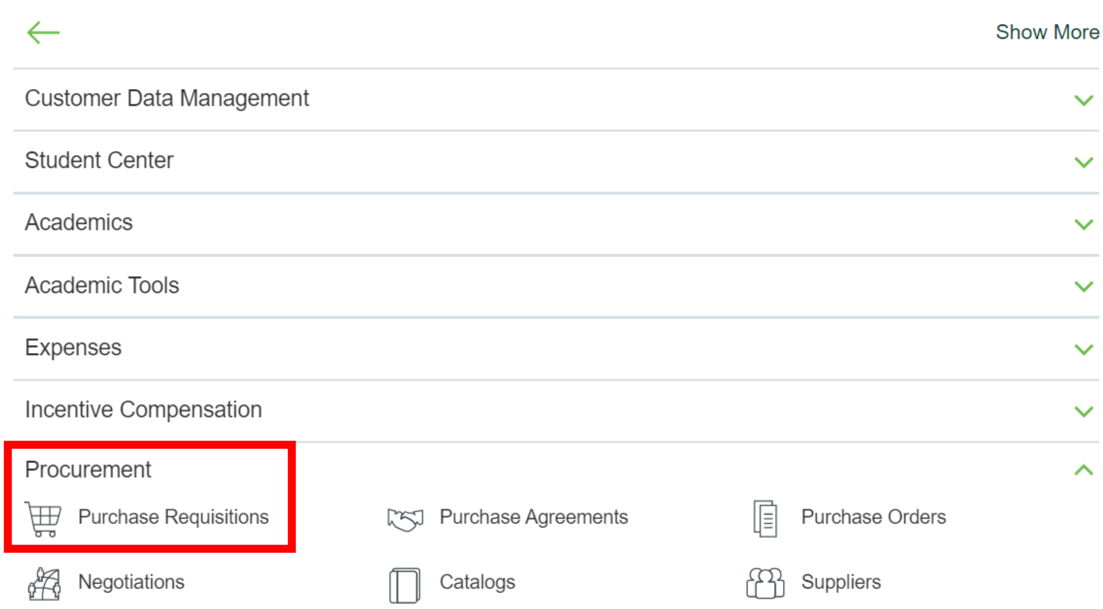
- This job aid is intended for all individuals with the Shopper role.
- An 'After the Fact Request' refers to a purchase that occurs before a PO is issued and requires obtaining approval after the commitment was made, rather than before.
- If you have made an external purchase prior to creating a requisition in Ignite, you will submit an 'After the Fact Request' to create a requisition for this purchase, a Procurement specialist will need to review this submission in order for a PO to be created. Once reviewed by the Procurement specialist, a PO will be generated for payment.
- After the Fact Requests represent unauthorized purchases, as such all requests must contain sufficient justification and an action plan detailing how the request will be avoided in the future.

1. Navigating to After the Fact Requests

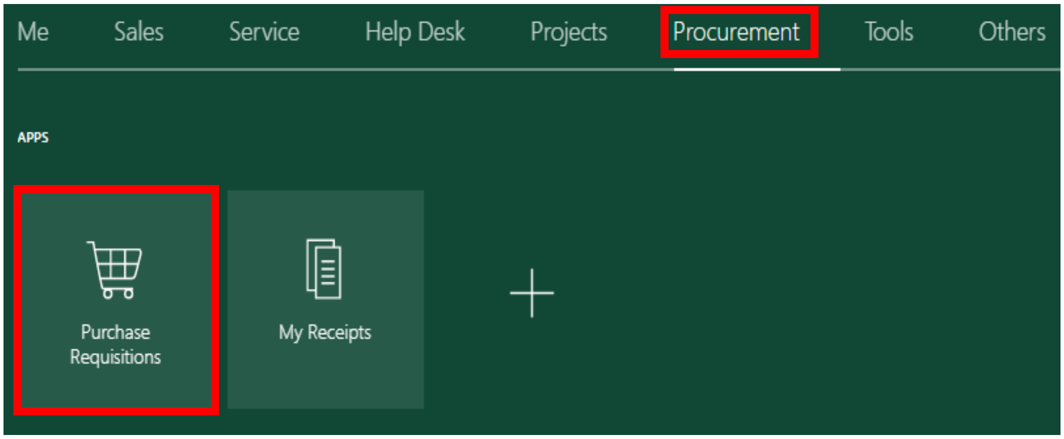
1. You can access the **Purchase Requisitions** task in two ways:
   a. (Option 1) Click the **Navigator** icon in the upper left-hand corner of the Ignite landing page.



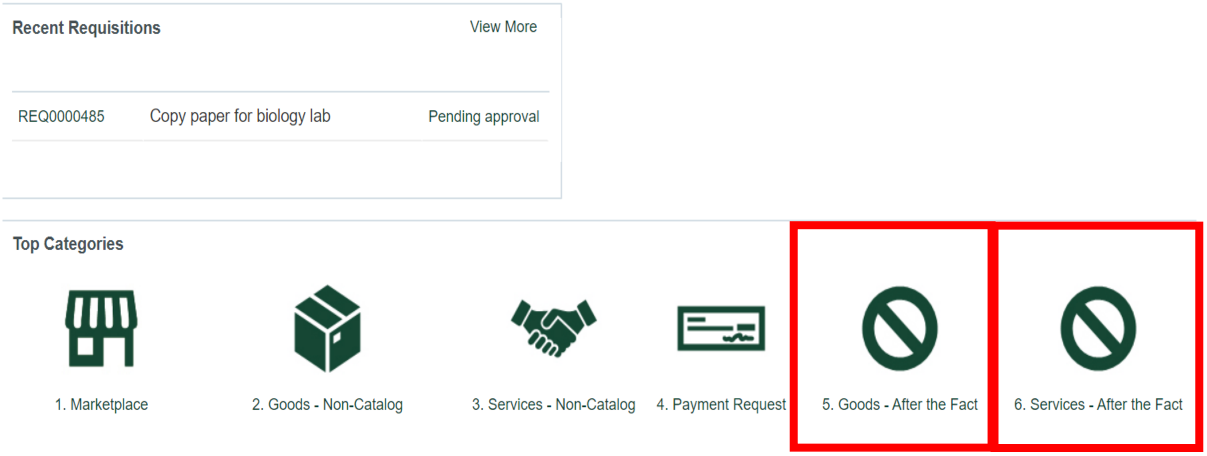
   b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.

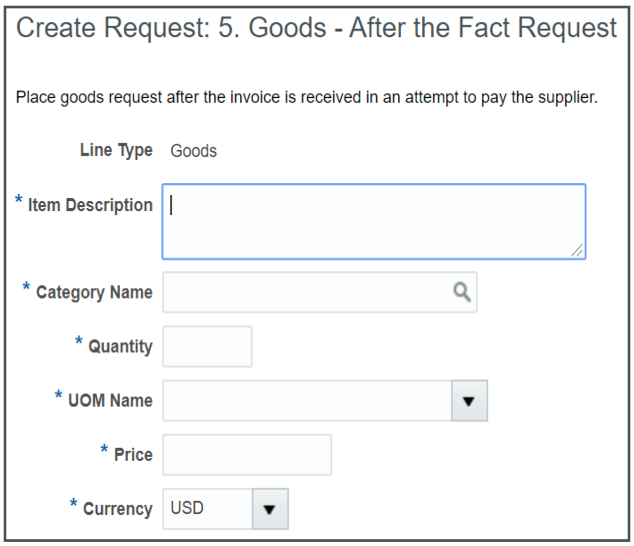


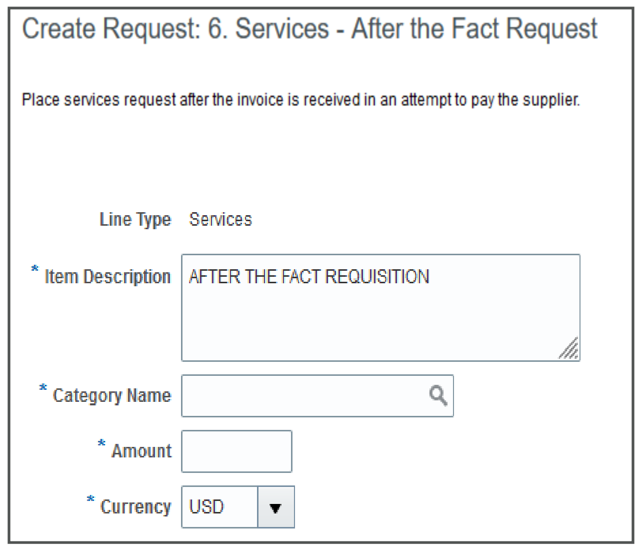
2. Scroll to the bottom of the page and select either **Goods- After the Fact** or **Services- After the Fact**.



2. Submitting an After the Fact Request

1. Enter the required fields for a **Goods-After the Fact Request**.
    a. **Item Description**: Description of item(s) you are requesting to purchase
    b. **Category Name**: Category of item(s) you are requesting
    c. **Quantity**: Total number of items you are requesting
    d. **UOM Name**: Unit of measure to describe the quantity of goods
    e. **Price**: Unite price for item(s)
    f. **Currency**: Defaults to USD

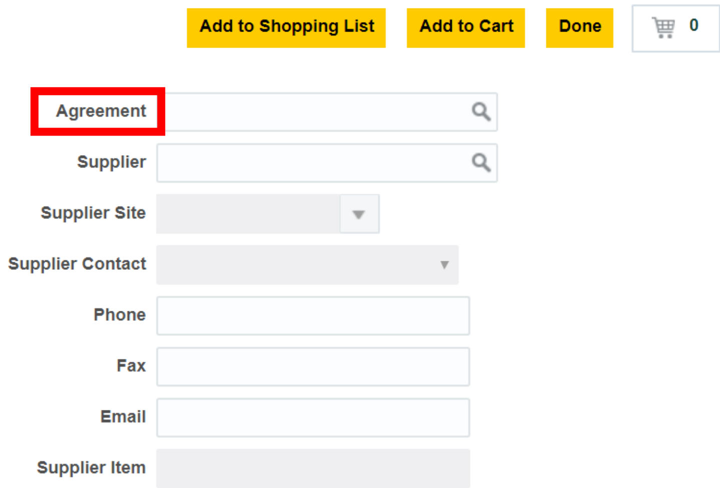




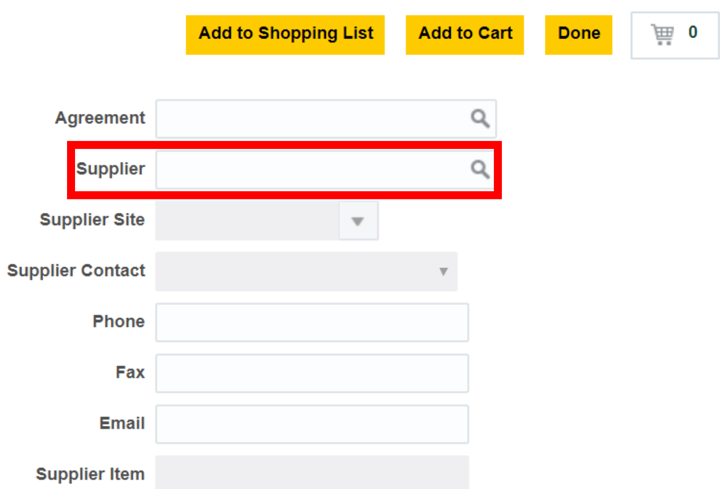
2. For a **Services-After the Fact Request** you are only required to enter:
    a. **Item Description**: Description of service you are requesting.
    b. **Category Name**: Category of service you are requesting. Use the search function to determine which category applies to your request.
    c. **Amount**: Total cost of the service being performed.
    d. **Currency**: Defaults to USD.

Note: When creating the requisition the quantity, unit of measure and price must match the invoice. Any requisitions that do not match the invoice will be rejected and returned for correction.

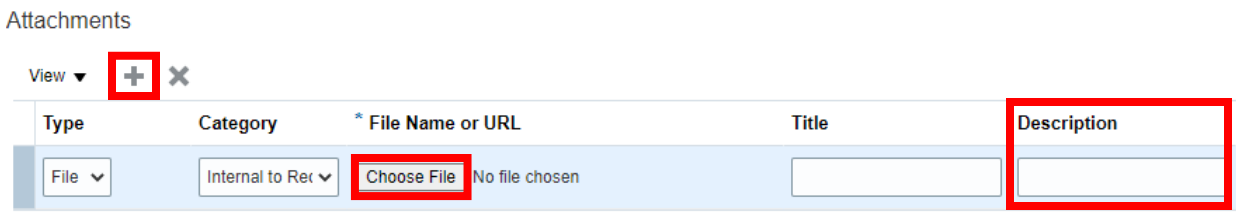
3. If there is a previously negotiated agreement with the supplier, an agreement number must be populated in the **Agreement** field. You can use the search function to locate the correct agreement number. Once the agreement is selected, the supplier information will auto-populate.



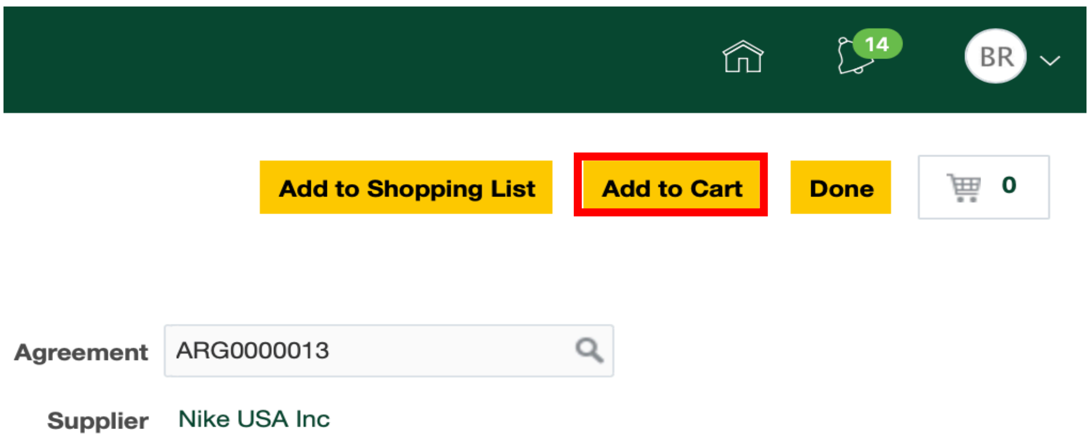
4. If the request is not related to a contract, then you must populate the **Supplier** and **Supplier Site** by using the search function or by directly typing the supplier's name. If there are multiple supplier sites (addresses), select the appropriate option from the drop-down. The remaining supplier contact fields will auto-populate based on the selection.



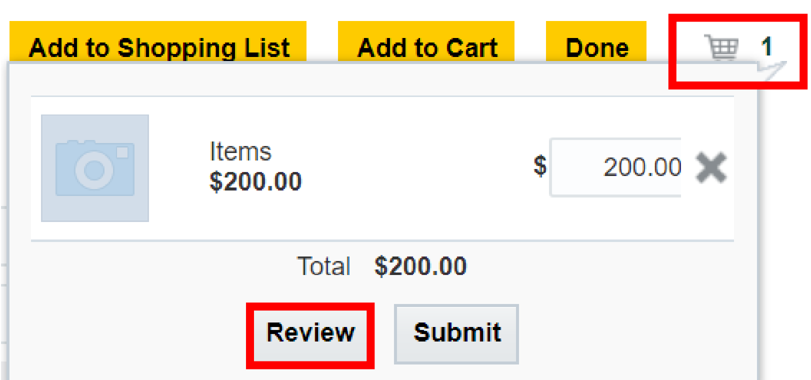
5. Be sure to add the appropriate **Attachment(s)** related to this request, such as an invoice that has already been received, emails supporting the purchase etc. Click the **+ icon**, then select **Choose File**, browse to locate the file, select it and click **Open**. The title of the attachment will populate. Add a **Description** for the attachment. Continue this process for all for all necessary attachments.



6. Next, click the **Add to Cart** button.

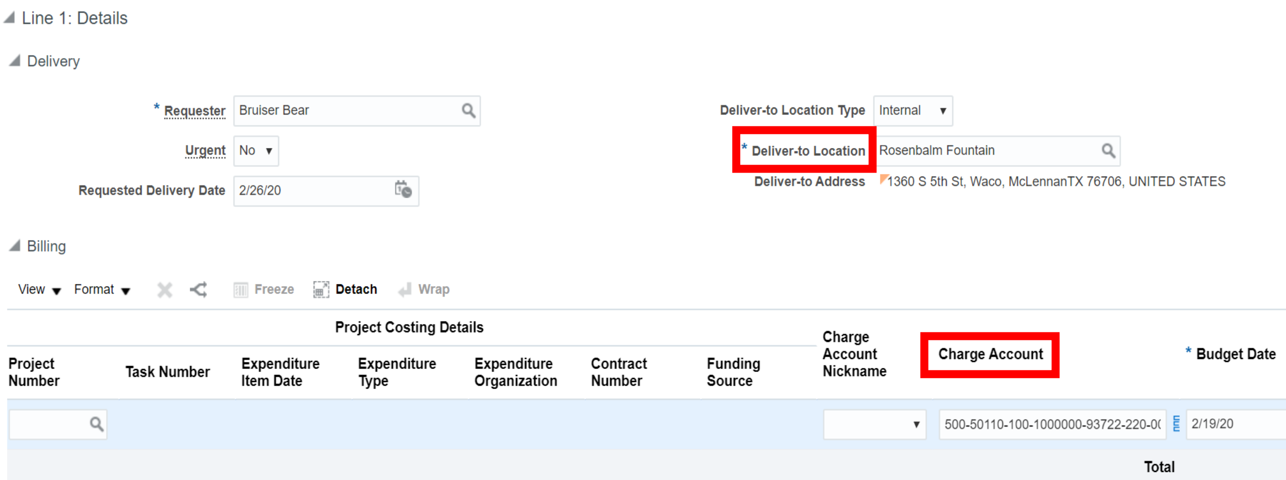


7. Click the **Cart** icon then select **Review**.

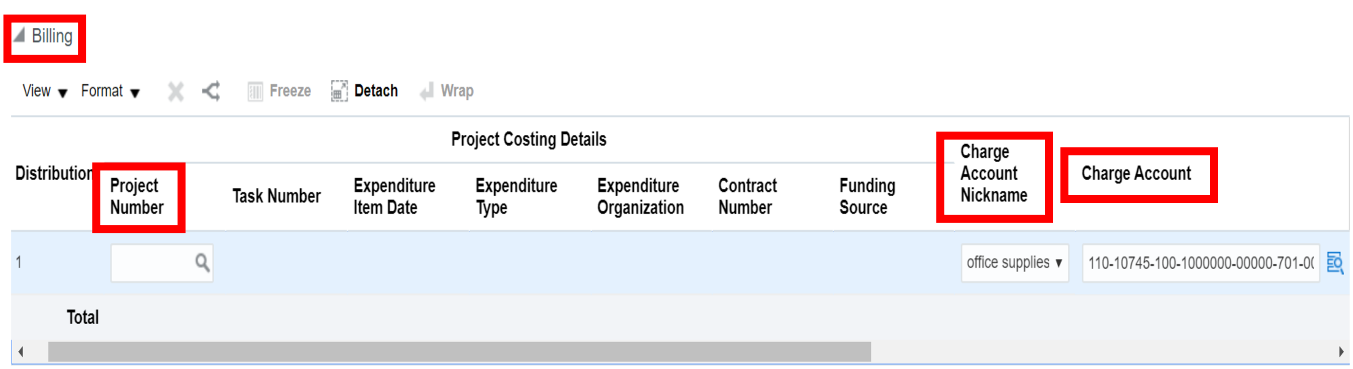


8. Review the requisition information. **Enter justification information for approvers to approve the transaction, including an action plan discussing how the After the Fact Request will be avoided in the future.**

9. The **Deliver-to Location** and **Charge Account** will auto-populate based on the information saved in your **Requisition Preferences**. *If you need to set up or change these preferences, see the Job Aids: Requisition Preferences – Charge Account COA-POETAF or Requisition Preferences – Shipping & Delivery Address.* These can be changed, if needed.

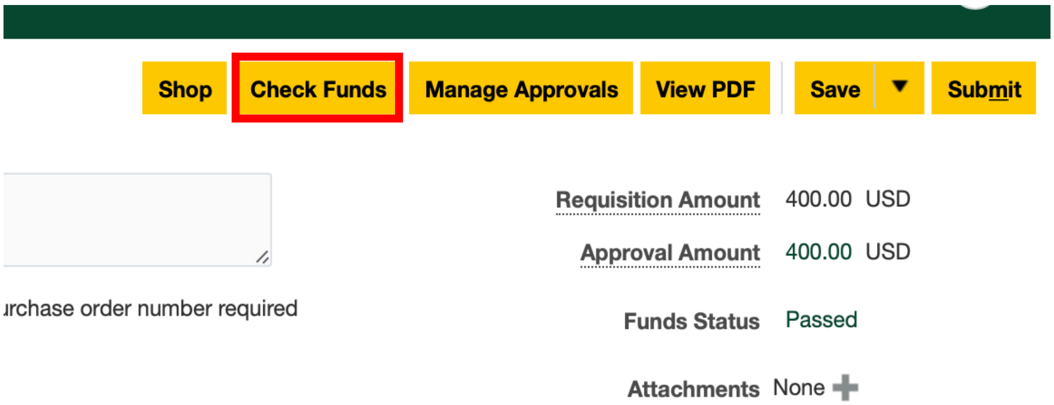


10. In the **Billing** section, review the **Charge Account** information for each line item. If you need to charge your requisition to a sponsored program, you can enter the **Project Number** in this section, or select a pre-defined charge account by changing the **Charge Account Nickname.**

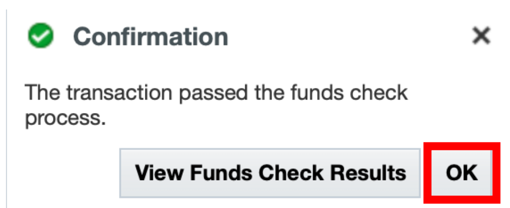


Note: The Account segment of the chart of accounts can only be changed by selecting a different procurement category.

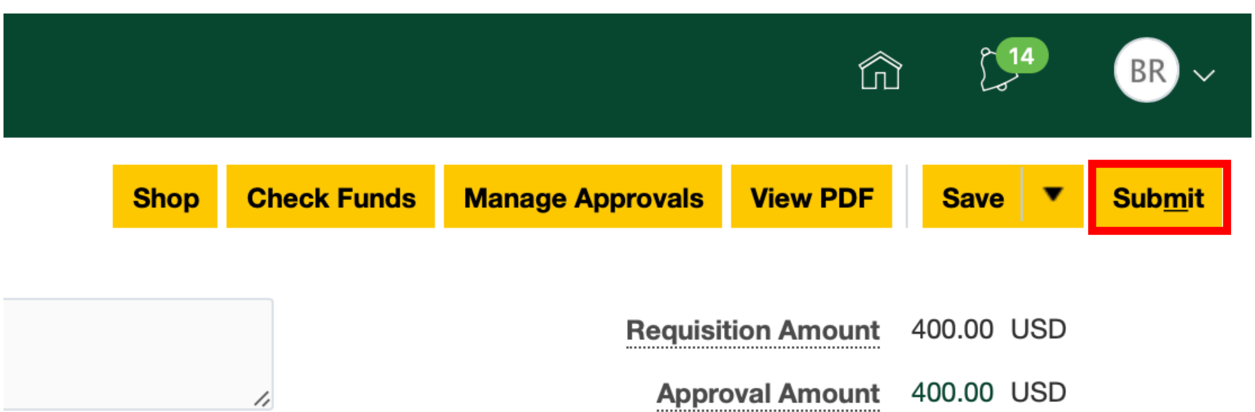
11. Prior to submitting the requisition, click the **Check Funds** button to confirm that funding is available.



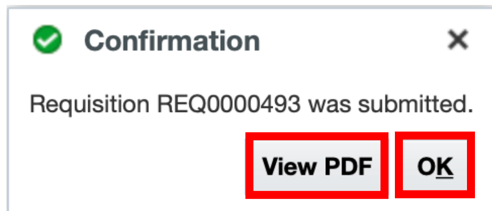
12. A pop-window will appear indicating whether the funds are available. Select **OK**.



13. Click **Submit** for approval.



14. A pop-up message will appear confirming that the requisition has been submitted for approval. Click **OK**. To view a PDF version of the request, select **View PDF**.



15. You can see the **requisition number** and **status**. After the requisition has been submitted, it will require the necessary approvals and then flip to a Purchase Order. The Supplier will send Baylor University an invoice, which will be reviewed and then paid by AP.