After the Fact Requisitions

I. Overview

- Per Baylor's Procurement Policy:
    - "An After the Fact purchase occurs when liabilities are incurred on the University's behalf without prior approval of a requisition and communication of a valid Purchase Order.
    - After the Fact purchases may be rejected at the University's discretion; therefore, any University personnel that have inappropriately, or without authority, incurred or created an obligation without an approved Purchase Order or other exemption may be personally liable for such obligation.
    - After the Fact purchases made under sponsored projects may not be allowed if the purchases have not undergone the federal purchasing requirements review process that occurs before the issuance of a Purchase Order."
- Use the following instructions if you have an invoice for a purchase that was made prior to creating a requisition in Ignite.
- Pay close attention to the requirements for adding the Purchase Order # (ORD1234567) to the invoice before it is sent for processing to avoid complications.

II. Navigation - You can access the **Procurement module** in two ways:

Option 1:

1. Click the **Navigator** icon in the upper left-hand corner of the Ignite landing page.

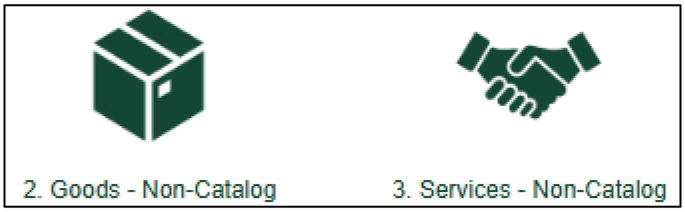
2. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions**.

Option 2:

1. From the Ignite homepage, click the **Procurement** tab. It may be necessary to click the right arrow to view the Procurement tab.

2. Click on the **Purchase Requisitions** tile.

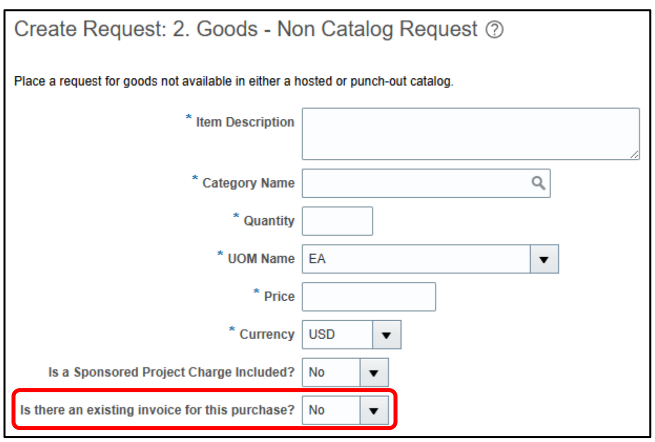
3. Scroll down and select either **Goods – Non-Catalog** or **Services – Non-Catalog**.

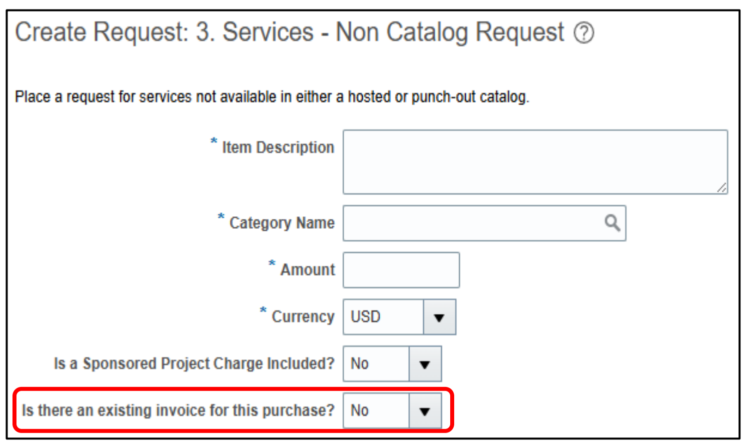


III. Submitting an After the Fact Request

1. Complete the following field:
   a. **Item Description:** Define what you are requesting to purchase
   b. **Category Name:** Select the appropriate Procurement Category
   c. ***Quantity:** Total number of items you are requesting
   d. ***UOM Name:** Select the appropriate Unit of Measure to describe the quantity
   e. ***Price:** The unit price for the item(s)
   f. ****Amount:** The total cost for the line item
   g. **Currency:** Defaults to USD and should not be changed
   h. **Is a Sponsored Project Charge Included?** Select Yes or No if the line item is being charged to a Sponsored Project
   i. **Is there an existing invoice for this purchase?** Select Yes or No. **Yes, indicates an After the Fact purchase.** The Quantity, Unit of Measure, and Price MUST match the invoice.

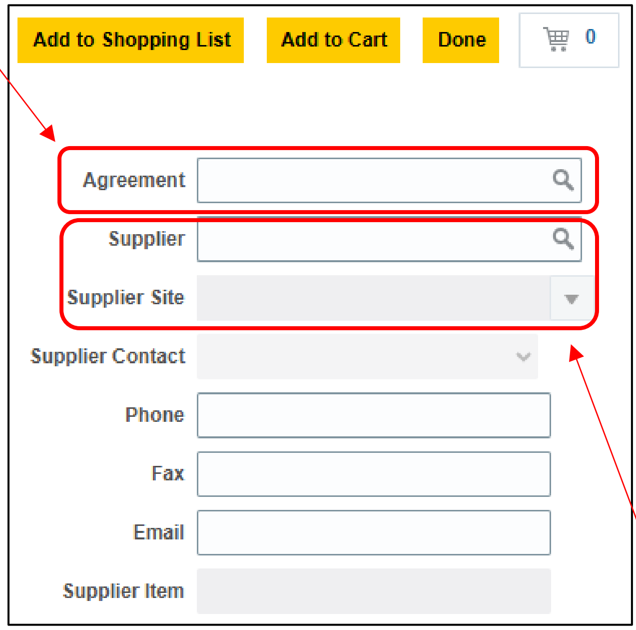
**Relates to the Goods-Non Catalog form / **Relates to the Services-Non Catalog form*





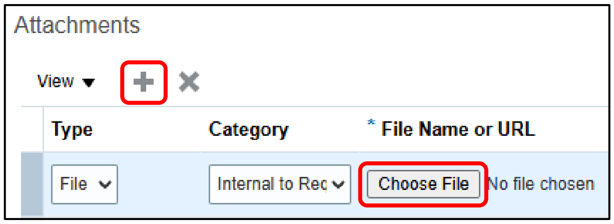
> **Note**: **Do not attach the invoice at this stage.** Retain the invoice until the requisition is converted to a PO, then follow the steps in Section IV of this job aid.

2. 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.



3. If the request is not related to a contract, then select 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.

4. Add any appropriate **Attachment(s)**, such as emails supporting the purchase, etc.
   DO NOT ADD THE INVOICE AT THIS POINT.
   a. Click the **+ icon**
   b. Select **Choose File**
   c. Browse to locate the file, select it and click **Open**.
   d. The title of the attachment will populate.
   e. The File Name or URL, Attached By, and Attached Date will auto populate.
   f. Add a **Description** for the attachment.

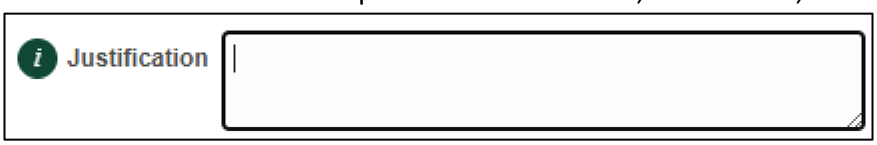


5. Click **Add to Cart** in the upper right corner.

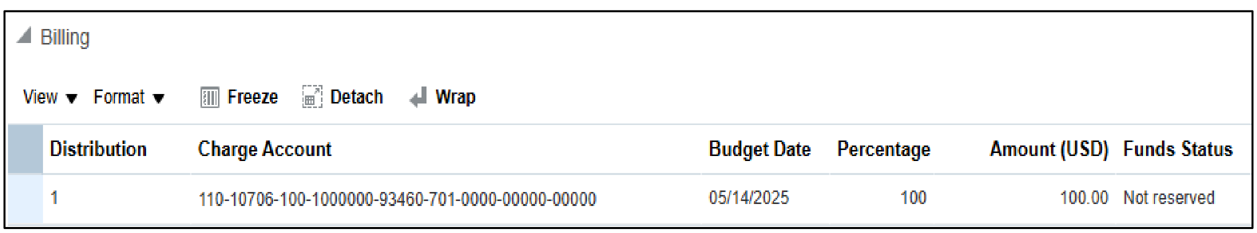
6. Click the **Cart** icon in the upper right corner, then select **Review.**

7. The **Requisition number** has been assigned and is noted in the top left corner.
8. The **Description** you provided on line item 1 has been copied to the requisition header.
    a. If the REQ has only 1 line item the description can stay, as long as it is concise, professional, easy to read, and explains *WHAT* is being requested for purchase.
    b. If the REQ has multiple lines, you will need to update the description to include a summary of all items.

9. In the **Justification** field, explain *WHY* the purchase was necessary and why a REQ was not submitted in advance of the purchase. It should NOT be a duplicate of the description field. The reviewer should have enough information to determine if the purchase is allowable, reasonable, and necessary.

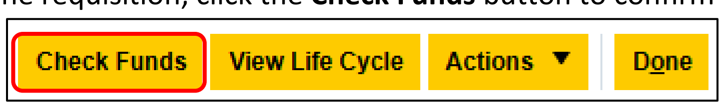


10. Scroll down to the **Billing** section in **Line Details** and confirm the Charge Account or POETAF information is correct.

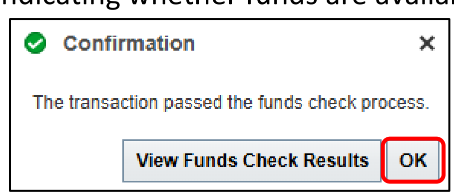


Distribution	Charge Account	Budget Date	Percentage	Amount (USD)	Funds Status
1	110-10706-100-1000000-93460-701-0000-00000-00000	05/14/2025	100	100.00	Not reserved

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



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



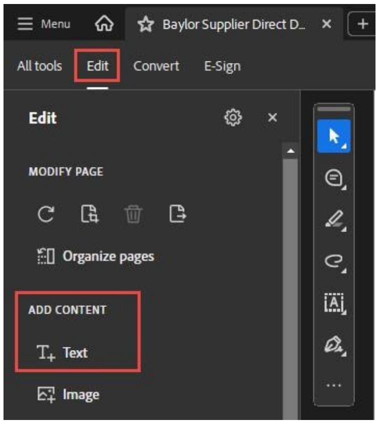
13. Click **Submit** in the upper right corner to initiate the approval process. A pop-up message will appear confirming the requisition has been submitted for approval.
    a. Select **View PDF** to view a PDF version of the requisition.
    b. Click **OK** to close.

14. Monitor your notifications for the Purchase Order to be issued. The user who entered the REQ will receive an email and Bell Notification displaying the Purchase Order number assigned to the Requisition. An example of the email subject line showing the PO and REQ is provided below:

FYI: Document (Purchase Order) ORD0208219 (Requisition REQ0292636) Implemented

IV. Submitting the Invoice – Baylor uses a scanning software to process invoices submitted to the Accounts Payable inbox. Review the following requirements and instructions carefully to ensure your invoice is processed correctly.

1. Requirements and Standards:
    a. All invoices must be in **PDF** format.
    b. The PO number (ORD1234567) must appear directly on the face of the invoice.
        i. Adding the ORD number to the email body or file name is not sufficient.
        ii. Do not use the Comment tool to add the number.
    c. The PO number must include the full prefix (ORD1234567).
    d. A Requisition number is NOT the same as a PO number (ORD1234567).
    e. If needed, users may print the invoice, write PO number clearly on the invoice, and scan it back as a PDF.
    f. The full version of Adobe Acrobat is required to add a text box directly to the PDF.
        i. This is available from Baylor ITS.
        ii. The Adobe Reader will not work.



2. How to Add the PO Number Using Adobe Acrobat.
    a. Open the invoice in Adobe Acrobat (full version).
    b. Click **Edit** near the upper left corner.
    c. In the **Add Content** section, select **Text**.
    d. Drag a text box onto the invoice and enter the PO number (ORD1234567).
    e. Click **Menu** in the upper left corner, select **Save**
    f. The document is now ready.

3. Submitting the Invoice to Accounts Payable.
    a. Invoices should be sent in separate files.
        i. Only one invoice per attachment.
        ii. Never group invoices into the same attachment.
        iii. Grouping invoices will likely result in only the first invoice being recognized by the scanning software.
    b. The maximum file size is 25 mb (email server limit).
    c. We recommend you compress files to under 5 MB at 300-600 dpi for clarity and efficiency.
    d. Send the finalized PDF to Accounts_Payable@Baylor.edu.