

Unified Procurement Services Team (UPST)

Boston F&A Meeting

September 10, 2024



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law

Agenda

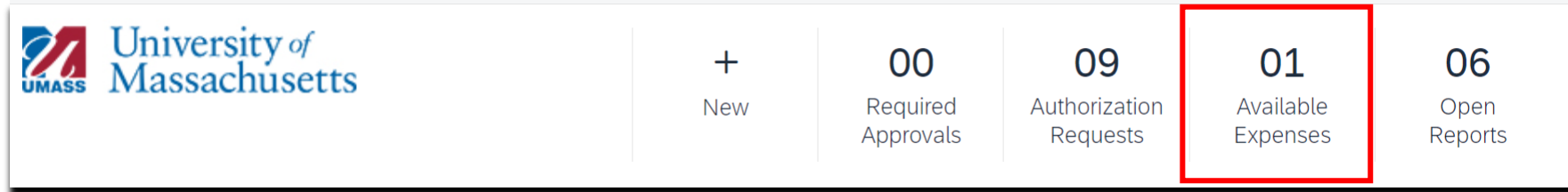
- Bank Card Updates
- Sourcing Request Process
- Supplier Diversity Updates
- Trainings
- General Announcements

Bank Card Updates

Allocating Transactions in Concur & Bank Card Refresh Program

Allocating Bank Card Transactions

All bank card transaction should be allocated in an expense report in Concur within **30 days of the transaction date**. Please be sure to include all receipts and BTE documentation (when required).



If transactions are not allocated within a 30-day window, the cardholder will receive the following reminders:

- 35 days – warning email
- 60 days – warning email (includes manager/supervisor)
- 75 days – warning email (includes manager/supervisor)
- 90 days – Bank Card is suspended, and limit is reduced to \$1.00 until the cardholder becomes fully compliant

Bank Card Refresh Program

Starting in FY25, the Bank Card program will go through a **refresh**. Any Bank Cards issued in 2020 (approximately 2,500) will expire and need to be renewed.

Are there any requirements?

Before a replacement Bank Card is issued, the following requirements **must** be met by the cardholder:

- All Bank Card statements from July 2022 up through card migration into Concur must have been submitted.
 - Each statement submitted, must have its own requisition with all related receipts attached in BuyWays.
- A completed Replacement cardholder agreement.
 - Agreements will be issued starting July 1, 2024, to ensure cards go out quickly after receipt by UPST.
- Concur expenses must be current within 30 days for a new card to be mailed to a cardholder.

Sourcing Request Process



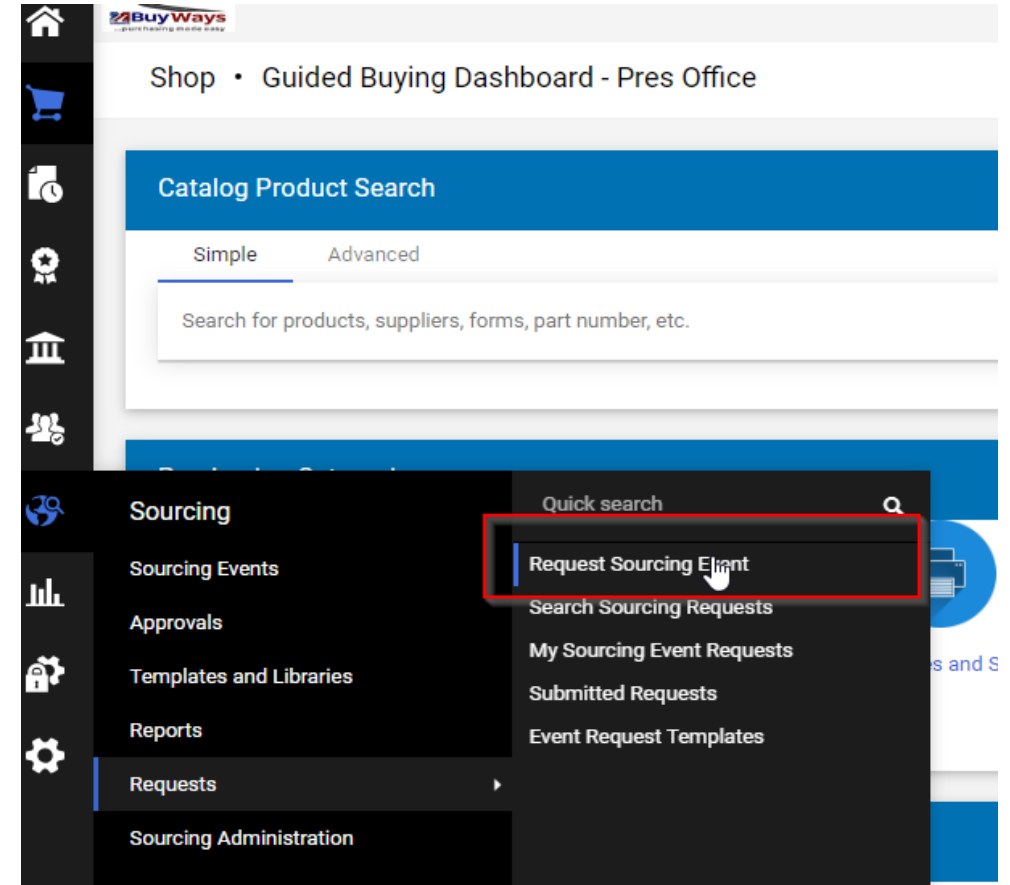
Sourcing Request Moving to BuyWays

What and When?

The Sourcing Event Request form will be moving from the UPST Webpage into BuyWays under the Sourcing module.

By entering the request in BuyWays there will be a clear link from the Bid to the Contract to the Requisition/PO.

We expect to deploy the new form later this Fall and will keep you updated on its launch.



CDW + Apple Catalog

Apple products have been included in the IT VAR program through the CDW punchout catalog!

- Streamlined processing
- Better savings

Our goal is to have all Apple catalog open orders completed on or before the **end of Q2 FY25**.

We hope to share specific dates soonest!



Supplier Diversity Updates



Supplier Diversity in Bid Events

The Bid Scoring Template now has additional Supplier Diversity Criteria for consideration.

This allows suppliers to showcase their Diversity Programs and allows the University to give credit to those initiatives.

This is currently live, where anyone who becomes involved in a bid event will be able to discuss this directly with the sourcing team.

Sections included in RFX	(mark with x)				
Diversity Certifications	x (required)	10 – if all declared classifications are backed up by certifications 5 – if some or all declared classifications can't be backed up or verified 1 – if no diversity classifications have been declared			
Workforce Diversity	x	10 – if the supplier has a diverse workforce, diversity in leadership and practices 5 – if the practices appear “acceptable though average” 1 – none or none reported			
Internal DEIA Practices		10 – if the practices seem formal and robust, with clear leadership or documentation 5 – if the practices appear “acceptable though average” 1 – none or none reported			
Tier 2 Supplier Diversity	x	10 – if the supplier has a robust supplier diversity program in place with documentation 5 – if the practices appear “acceptable though average” 1 – none or none reported			
The Table below will auto-populate the weightings based on your inputs above and a recommended 70/30.					
		Company 1		Company 2	
Supplier Diversity Aspect	Weight	Raw Score	Weighted Score	Raw Score	Weighted Score
Diversity Certifications	70%		0.00		0.00
Workforce Diversity	15%		0.00		0.00
Internal DEIA Practices	0%		0.00		0.00
Tier 2 Supplier Diversity	15%		0.00		0.00
Total	100%		0.00		0.00
Transfer these values to the Supplier Diversity row					
Instructions		Weighted Evaluation Criteria		Supplier Diversity	

Check Out the Supplier Diversity Program Website

The Supplier Diversity Program page outlines UMass's commitment to fostering economic opportunities for diverse-owned businesses. It provides resources for suppliers to become certified, guidance for campus buyers on selecting diverse suppliers, and more. For further details, visit the [Supplier Diversity Program page](#).

Program Information



For Suppliers

If you are a diverse supplier interested in doing business with UMass, or an existing supplier interested in participating in our Tier 2 program, please visit this page to learn about the ways we work with our supplier community to expand access to opportunities within the University system.



For Campus Buyers

As campus decision-makers, contract managers and relationship owners, the UPST's goal is to partner and collaborate with you to make supplier diversity a seamless yet intentional part of your everyday procurement decisions. Find out how you can make a difference here.



Partnerships

UMass partners with government offices, higher education institutions, diversity organizations and agencies to collaborate on supplier diversity initiatives that aim to build the capacity of diverse businesses across the Commonwealth and link them to viable business opportunities.

Trainings



Need Training?

Are you or your team new to UMass or just need a refresher on how to:

- Enter and submit a requisition?
- Submit payments and invoices?
- Create a contract request?
- Submit a supplier request?

Whether you're a new employee or a seasoned team member, the Training & Communications team is here to support your department's needs!

Email us at upst@umassp.edu with the subject **"My Dept Needs Training"** and include details on your specific needs and preferred training dates.



General Announcements

Get Assistance From Buddy!

Make Buddy your go-to for any UPST questions!

Found at the bottom right-hand corner of any UPST page, Buddy can assist with pressing inquiries such as:

- What is the status of my supplier's payment?
- Which commodity code do I use for ...?
- How do I start a contract/contract amendment?





Please be aware that Travel & Expense now resides within the Employee Services Team (EST). If you inquire about Concur with Buddy, it will guide you to the new T&E site.

Case Self-Service

Want to see your open cases or the status of all cases? Check out [Case Management Self-Service!](#)






SUPPORT HOME PAGE KNOWLEDGE ARTICLES **VIEW YOUR CASES** CREATE CASE


View Your Cases

 Cases 

Recently Viewed ▼

1 item • Updated a few seconds ago

Search this list...     

	Subject ▼	Contact Name ▼	Status ▼	Date/Time Opened ▼	Case Number ▼	
1	Dropbox Corrupt File Folder Detected - Ashley Hun...	Ashley Hunter	Closed	3/20/2024 9:12 AM	00274749	

Join us Every Tuesday at 11am!



UMASS Unified Procurement Services Team

OFFICE HOUR

COME WITH ALL YOUR QUESTIONS!



EVERY TUESDAY 11AM-12PM

REGISTER VIA ZOOM

UMASSP.ZOOM.US/MEETING/REGISTER/T3UQF-ISPZ4TH9MSXFLDMB8KALVTCU8U8GJE

Don't miss out on our weekly office hour!

Members from the all teams are available to help answer your questions in breakout rooms:

- Accounts Payable
- Bank Card
- Contracts
- Requisitions & Purchase Orders
- Supplier Management
- Travel & Expense

[Register for One or All Sessions!](#)

upst@umassp.edu

