You will need to contact CPS for assistance.

**START**

Identify the Need for a GOOD or SERVICE

**NO**

You may proceed

**YES**

Are you using the State or GA Contract?

**NO**

You may proceed

**YES**

You may proceed

Is the GOOD or SERVICE on State or GA Contract?

**NO**

Do you have sufficient and documented reason NOT to use the State or GA Contract?

**NO**

You may proceed

**YES**

You may proceed

Identify potential suppliers for the GOOD or SERVICE

**NO**

Is the vendor you selected on the STATE of NC Debarred Vendors Listing?

**NO**

You may proceed

**YES**

Stop, you can't continue

You will need to find another supplier
You will need to contact IT or FMD for Approval

Stop, you can't continue

Have you received APPROVAL from IT or FMD for this purchase? (IF Required)

You may proceed

Negotiate the best price with the vendor, inform them of UNSA Tax-Exempt Status

You may proceed

Is the TOTAL Price (including shipping) under $2500?

You may proceed

Is the TOTAL Price (including shipping) under the $5000 Bidding Threshold?

You may proceed

IS the GOOD or SERVICE a Sole Source Item or qualify for an exemption from Bidding?

STOP - you will need to contact Purchasing to get directions on how to start the BID process.

You will need to get an official QUOTE from the vendor and submit to the Purchasing_Inbox

Contact Purchasing to discuss Sole Source and / or qualifying Exemption.
STOP - you will need to contact Purchasing to get directions on how to start the BID process.

Did Purchasing approve your Sole Source / Qualifying Exemption Request?

You may proceed

Select Vendor - if under $5000. (if over $5000, then Purchasing will assign vendor)

Look up Vendor in Banner. If Vendor is not located, direct them to Purchasing Website to complete a Vendor Form.

STOP - you will need to transfer Budget to cover the expense before proceeding.

Check available BUDGET Balance in appropriate FUND and ACCOUNT. Is there sufficient budget to cover the expense?

You may proceed

Key a Purchase Requisition into BANNER Self Serve

Is the GOOD to be delivered to the Central Receiving Location?

Make sure to key using the SHIP TO Code 068

Use your Normal SHIP TO Code

NO

YES

NO

YES

NO

YES
Receive Purchase Order via email after requisition is processed by Purchasing.

Forward the Purchase Order and PO Terms & Conditions to the vendor to finalize the order.

Key information regarding State / GA Contracts or Bids in the DOCUMENT TEXT.

Is the Item a FIXED ASSET?

You may proceed

Did you key it to a Fixed Asset Code (ending in 1)?
Did you key in the required information (Eqpt. Mgr, Custodian, Building and Location)?

STOP - You will need to key to the correct account and include required information.

You may proceed
Vendor delivers the product or provides the service.

Was the GOOD or SERVICE satisfactory?

Send email to BANNER APP RECEIVING to receive the GOOD or SERVICE

Forward the Invoice to ACCOUNTS PAYABLE Inbox for matching to PO.

Monitor the Purchase Order on the Open Encumbrance Report and close out once the Invoice is paid, if the PO remains open.

Finish

Contact Vendor to get corrected

NO

YES

You may proceed