PURCHASING PROCESS FLOWCHART

Requisition (Req) is entered into PeopleSoft Financials

Do the items fall under the category of computer, printer, or other electronic device requiring ITS support?

Yes → Req is sorted to ITS for review and approval.

Is Req approved?

No → ITS will reach out to Requester with any concerns.

Yes →

No →

Req is sorted to Budget Administrator's worklist for approval overnight. PeopleSoft sends an automated email notification to the approver.

[routing is based on Dept code used in the account string]

Is the Req approved?

No → Requester asks Fiscal Accountant or BSA to cancel Req

Text **Yes** → Req is sorted to Fiscal Accountants for review/approval

[routing is based on Program code used in the account string]

Did Req's dollar amount change?

Yes →

No →

Accountant will Deny the Req and Requester will receive an automated email with their comment(s) on what corrections are needed.

Requester will need to modify the Req and submit it back into the workflow.

Is Req approved?

No →

Yes →

Req status is now Approved.

System will run Budget Check process to ensure that there is sufficient funding in the budget

System will send an automated email to the Requester advising that there was a Budget Error.

Department must review budget and take action to make funding available to cover the cost of the Req. Reach out to a Fiscal Accountant for guidance.

PeopleSoft will automatically rerun Budget Check once the budget issues have been resolved.

Does the Req pass Budget Check?

No →

Yes →

Req will be available for Buyers to review and process into Purchase Orders (POs)

Requester provides Buyer with documents and/or info requested.

Does Buyer need any additional info or documentation?

No → **PO is created, signed, and dispatched. A copy will be sent to both Vendor and Requester.**

Yes →

Buyer will reach out to Requester for any additional supporting docs, info, or questions regarding the purchase.