Ohio | Buys

How to Submit an After-the-Fact Purchase Requisition

Step-by-Step Instructions for Submitting an After-the-Fact Purchase Requisition

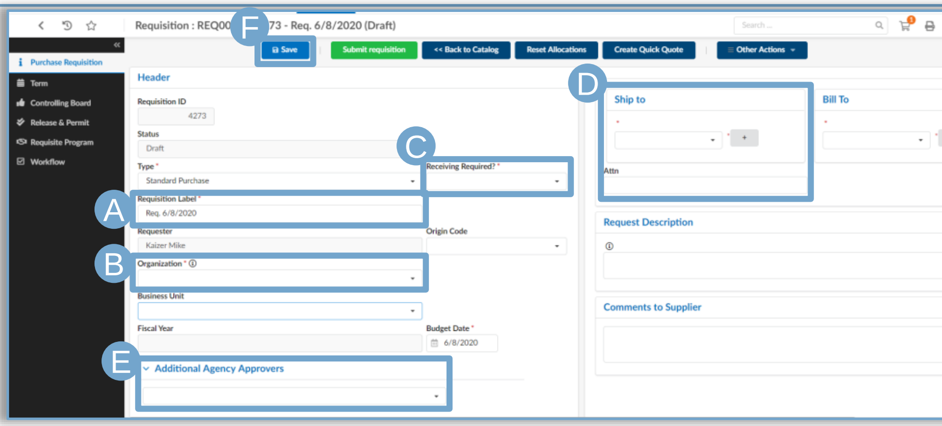
▲ Please note that the following job aid applies only to non-Pcard after-the-fact purchase requisitions. To create an after-the-fact Pcard purchase Requisition, please consult the Submit a Pcard Purchase Requisition section of the Purchase Requisition Learner Guide.

1

▲ An after-the-fact purchase requisition refers to an instance where a purchase has already been completed, but the purchase requisition has not been completed.

To create an after-the-fact purchase requisition, first add the associated catalog and/or freeform line items to your shopping cart and begin the checkout process.

2



The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

a) Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is *"Office Supplies JD"*).

b) Select your **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.

d) Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '**+**' icon to provide a one-time delivery address. Please note, you should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

f) Click **Save.**

Step-by-Step Instructions for Submitting an After-the-Fact Purchase Requisition

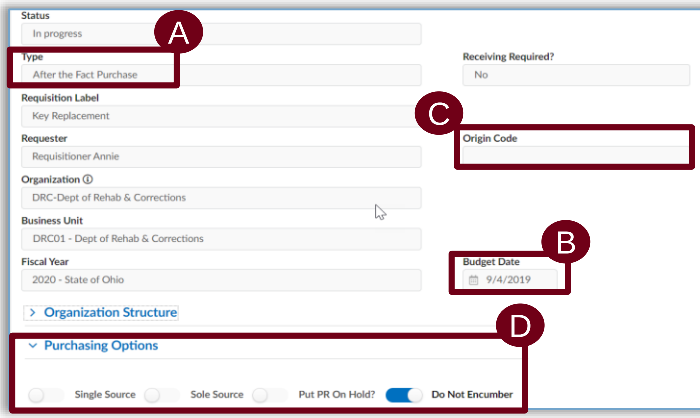
3

a) Update the **Type** to *After-the-Fact Purchase.*

b) Select the **Budget Date**. The relevant fiscal year will populate in the **Fiscal Year** field.

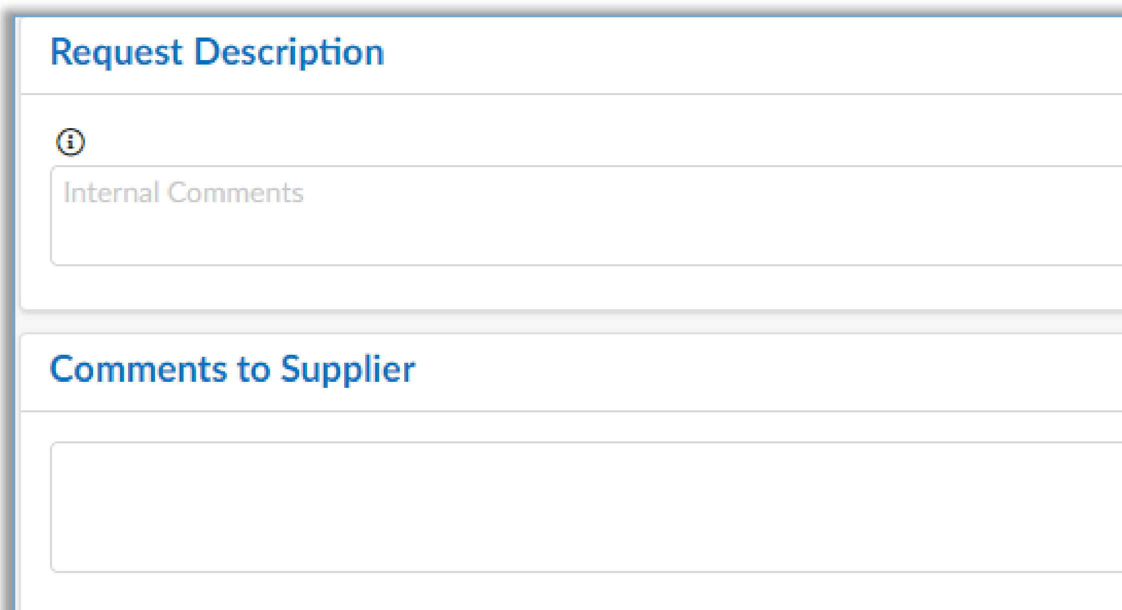
c) Select the **Origin Code** based off the agency you're purchasing for.

d) Expand the **Purchasing Options** section. From this section, you can the purchase requisition is **Single Source** or **Sole Source** purchase.



4

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level.



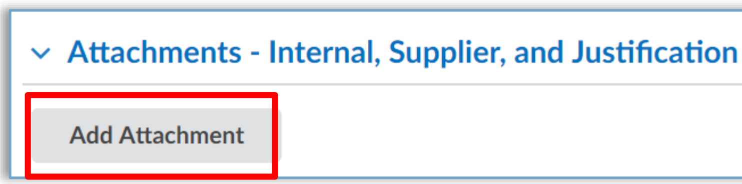
How to Submit an After-the-Fact Purchase Requisition

Step-by-Step Instructions for Submitting an After-the-Fact Purchase Requisition

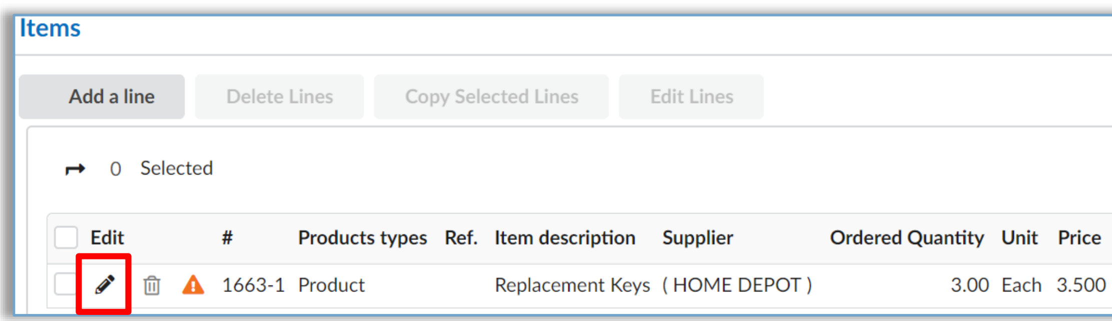
5 Click the **Save** button.

6 ⚠ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

- Internal Attachment: Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, supplier quotes) helpful for future reference or approvals.
- Justification Document: Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a supplier that isn't a requisite procurement program.
- Supplier Document: Documentation sent to the Supplier with the purchase order.



7 Click the **Pencil (✎)** icon to add any necessary chartfield information and other information to the line items associated with the purchase requisition.



8 Continue making updates to any remaining line items. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition.**

How to Submit an After-the-Fact Purchase Requisition

Step-by-Step Instructions for Submitting an After-the-Fact Purchase Requisition

After your requisition has been submitted for review you can check its approval status at any time.

- When an after-the-fact purchase requisition is submitted it will go through the same requisition workflow as other requisition types. If a purchase order is needed, the requisition will pull in different approvers and follow a different route along the workflow than a purchase that does not require a purchase order (i.e. a Pcard purchase).
- If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

Workflow Main Approvals

Approval Type	Approved By	Purchase Requisition	Agency	Label	Approval Date	Approved	Performer
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal			STEELE BRANDON
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal			FiscalAgencyApprover1 SIT
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval			STEELE BRANDON
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval			Final Agency Approver 1 SIT

4 Result(s)

- On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.