Basic eVA Purchasing

Presented by Fiscal Services
Purchasing Policy

University Policy 2106

• Reasonable and Economical
• Mandatory State and University contracts
• Use of Small, Women, and Minority (SWaM) owned businesses
• Employees may NOT sign contracts that exceed the $5,000 single purchase limit (unless authority is granted by the University President and Senior VP)

You may contact purch1@gmu.edu for contract related questions
What is eVA?

- Primary Tool for purchasing goods and services
- Electronic procurement system
- Mandated use by Commonwealth of Virginia
- Integrate with Banner Finance
- P-Card Purchases

Request login access to eVA:
https://fiscal.gmu.edu/purchasing/use-eva-purchasing/
What is exempt eVA?

- Over-the-counter purchases using the P-Card (Made at the site of sale by individual card holder)
- Individual travel and lodging
- Registration fees for conferences
- Reimbursements
- Honorarium Payments less than $2,000
- Payments to US Department of Homeland Security
- Postage
- Campus Vendors
Campus Vendors that are exempt from eVA

- Sodexo
  - Catering and on-campus dining
- Mason Bookstore and Patriot Tech
  - Over-the-counter purchases under $5,000 using your P-Card
    - Otherwise: eVA #VS0000038907, Barnes & Noble Booksellers, Inc.
- Mail services (i.e., postage, FedEx, UPS, etc.)
  - Canon Solutions (https://printandmail.gmu.edu/)
  - Business Cards purchased through Canon Solutions or Creative Services (http://ur.gmu.edu/creativeservices/businesscards/)
- Interdepartmental & Recharge expenses
  - https://fiscal.gmu.edu/controllers/recharge/
Before Beginning an Order

Determine if the Vendor exists in eVA

• Open [http://eva.virginia.gov](http://eva.virginia.gov), scroll to bottom left, click on “eVA vendors,” search by name

✓ If YES – Vendor will be:

  • **Registered Vendor** (Self-Registered)
    • Options include:
      • Punchout catalog
      • P-Card purchases (PCO#)
      • Electronic Order
        - OR -
  
  • **State-Entered Vendor**
    • previously paid by the State
Before Beginning an Order

χ If NO –

• **Un-Registered Vendor** that has never been paid by the State
  
  I. Send email request to vendor advising that they Self Register in eVA

  - OR -

  II. Obtain **Substitute** W-9 from vendor

  • forward to papadmin@gmu.edu with a note to add the vendor to eVA

  • If payment will be direct billed to the university and Accounts Payable will issue payment, ensure the vendor has a G# as well
Before Beginning an Order

1. Determine payment and ordering method
   - Does vendor accept P-Card?
   - Does vendor accept electronic orders?

2. Does the vendor provide a “punch-out catalog”

3. Confirm the item numbers, quantity and price from vendor if not using punch-out catalog
Using P-Card in eVA

- Preferred Payment Method
- No receiving required
- Integrates with Banner Finance through Bank of America Works allocation process
- When registered, P-Card will become the default payment method in eVA


**NOTE**: If P-Card is registered in eVA and the vendor does NOT accept P-Card you MUST uncheck “Use P-Card” box
Different Types of orders

Punch-Out Catalog Order

• Purchasers are “punched out” of eVA to shop as if they were on the vendor’s independent web site.
• Example: Supply Room

Non-Catalog Order

• Many vendors register with eVA but do not provide a PunchOut catalog
• Manually enter each item into eVA.

Orders costing over $5,000

• Purchases exceeding the $5,000 departmental limitation are processed through the Purchasing Office
• The purchaser will enter the order in eVA as a catalog or non-catalog order
Logging in to eVA
### Home Screen: Dashboard

**eVA**

**Go To**
- eMail / eForms
- Report and Resource Center

#### My Home
- My Orders / My UPS
- My Approvals
- My Quick Quote Req's

**Common Actions**
- Create
  - Requisition
- Manage
  - Reports
  - Receive
  - My To Do

#### Recently Viewed
- PR7845673 TEST TEST Nov 20
- PR7845606 Catalog Item
- EP258233 Le...Kleen Kanteen
- PR7533339 Le...Kleen Kanteen
- PR7560701 SC...Program Books

**News**
- Need help? Click here to view Training Guides and Videos

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**To Do**

<table>
<thead>
<tr>
<th>ID</th>
<th>Date</th>
<th>From</th>
<th>Status</th>
<th>Title</th>
<th>Required Action</th>
</tr>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>No items</td>
</tr>
</tbody>
</table>

**Requisitions - Composing**

| ID    | Date Created | Status   | Title                          | Total
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<tr>
<th></th>
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<tr>
<td>PR7845673</td>
<td>11/20/2017</td>
<td>Composing</td>
<td>TEST TEST TEST Nov 20</td>
<td>$294,660.00 USD</td>
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**Requisitions - Submitted**

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</tbody>
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**Requisitions Submitted This Month in Denied Status**

<table>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>No items</td>
</tr>
</tbody>
</table>

**My Documents**

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR7845606</td>
<td>TEST Non-PunchOut Catalog Item</td>
<td>11/20/2017</td>
<td>Composing</td>
</tr>
<tr>
<td>PR7845673</td>
<td>TEST TEST TEST Nov 20</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Configure Tabs**

**Refresh Content**
Creating a Requisition: Summary Page

- Vendor Name, Event Name, Purchase for, Product, Fund/Org, Date, etc.
- UN-Check if vendor does not accept P-Cards
- [https://fiscal.gmu.edu/purchasing/purchase-goods-or-services/search-for-an-existing-contract/](https://fiscal.gmu.edu/purchasing/purchase-goods-or-services/search-for-an-existing-contract/)

What is “PO Category?”
What is “Procurement Transaction Type”
**eVA PO Categories**

- **Use the R01 category for most routine purchases.**

- **Use the X02 Category for purchases exempt from eVA fees:**
  - Professional organization membership dues
  - Entertainment (speakers, lecturers, musicians, performing artists)
    - This DOES NOT include consultants, seminar facilitators or contracted workshop instructors
  - Honorarium payments of $2000 or more
  - Accreditation fees
  - Academic testing services
  - Advertisements (newspapers, magazines, journals, radio, television)
  - Real estate leases
  - Exhibition rental fees for exhibitions of historical artifacts or works of art.
  - Purchases from public auction (non-electronic)
  - State Agency to State Agency payments
<table>
<thead>
<tr>
<th>Procurement Transaction Type</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>10  Equipment – Non-Technology</td>
<td>Furniture, telescopes, athletic equipment</td>
</tr>
<tr>
<td>15  Equipment – Technology</td>
<td>Computers, servers, monitors</td>
</tr>
<tr>
<td>20  Supplies – Non-Technology</td>
<td>Books, T-shirts, promotional items, office, lab and event supplies, Food &amp; Beverage for student events</td>
</tr>
<tr>
<td>25  Supplies – Technology</td>
<td>Computers, computer components, software</td>
</tr>
<tr>
<td>30  Non-professional Services – Non-Technology</td>
<td>Consultants, dues, subscriptions, transportation, advertising, catering</td>
</tr>
<tr>
<td>35  Non-professional Services – Technology</td>
<td>Cable/Satellite TV Services, Cell Services</td>
</tr>
<tr>
<td>40  Professional Services</td>
<td>NARROWLY DEFINED: Practicing Professions such as accountants, architect, law, medicine</td>
</tr>
</tbody>
</table>

For list of examples visit: [http://fiscal.gmu.edu/training/obtain-training-materials/](http://fiscal.gmu.edu/training/obtain-training-materials/)
## Creating a Requisition: Adding Line Items

Integrates the vendors online ordering system with the eVA system.

Item information collected from an external source (catalog, etc) and manually entered into eVA.
Adding Line Items: Non-Catalog Item

1. **Full Description**: Item number and information provided by vendor’s catalog or website
2. **NIGP Commodity Code**: Look up the NIGP code before beginning an eVA order!
   - Go to [https://eva.virginia.gov](https://eva.virginia.gov) and select “NIGP Code Lookup” from the bottom right Resources menu.
3. **Supplier**: Select the desired vendor from search results
   - *Location, Reg. Type* and *Contract List* fields will populate based on selected vendor.
   - If more than one location exists for a vendor, click on “select” next to *Location* to choose the correct one
4. Input the appropriate **Supplier Part Number**
5. Input appropriate **Quantity, Unit of Measure** and **Price**
6. Click on “Update Total” and “OK”

Note: In eVA the symbol 📜 indicates a searchable field.
Adding Line Items: Punchout Catalog

Catalog Home
Catalog ▼

Contracts (142)
- Mandatory (70)
- Optional Source (55)
- Agency Specific (17)

PunchOut Catalogs (140)
- Life Science Electronic Test & Measurement at AGILENT TECHNOLOGIES INC
- Computer, Printing, Storage, Network, Software at CDWG
- Respon...
Accounting Details

Line Items:
1. Speed Pro 45 Electric Stapler, Full Strip, 45- Sheet Capacity
2. Prestige 2 Total Erase 3-Month Calendar, 36 x 24,

Accounting - By Line Item:
- Fund: (none selected)
- Organization: (none selected)
- Account Code: (none selected)
- Activity Code: (none selected)
- College Program: (none selected)

Split Accounting
• Add Comments on the purchase order for the vendor to review and select “Visible to Supplier”
• Select “Mark as Proprietary” for comments intended to be viewed by Approvers and/or Purchasing Office only.
Submitted Order

$5,000 or less

- P-Card is Used

- No eVA FUND/ORG approval

- Vendor accepts order electronically - OR - Order must be submitted manually

More than $5,000

- FUND/ORG approval

- Assigned a buyer in Purchasing
Do NOT Split Orders

A split purchases occurs when more than one transaction takes place back to back for the same item or with the same vendor. This gives the appearance that the cardholder is intentionally trying to circumvent the single transaction limit.

• A single cardholder makes multiple purchases from the same vendor in a short period of time
• Two or more cardholders in a unit purchase from the same vendor in a short period of time
• The total of the purchases exceed the single purchase limit

Order Splitting is not allowed, and will be subject to card suspension. Furthermore, you will NOT be reimbursed with State funds for your out-of-pocket expense.
General eVA information

• Mason is subject to, and complies with the Virginia State Prompt Payment Statutes, which mandates that invoices must be paid within 30 calendar days.

• In order to insure prompt payment the vendor may e-mail invoices directly to Accounts Payable (acctpay@gmu.edu).
  • All purchase order invoices must have a valid and current purchase order number (EP#) in order to be processed.
Receiving Process

• For Non-P-Card Orders, it is necessary to “receive” the items in eVA
• All invoice payment requests require direct communication with Accounts Payable. Encourage vendors to send final invoices through email to acctpay@gmu.edu noting the EP#

It is not necessary to “receive” P-Card orders in eVA. Approval of P-Card charges is completed through Bank of America Works.
Receiving Process

Vendor payments may not be processed, until you have acknowledge that the goods and services have been received.
Receiving Process

“Accept” when items have been received - OR - when an item has been previously received but now needs to be returned. In this case the order will need to be “Re-opened” and a change order must also need to processed.

“Reject” when items need to be returned because defective, not ordered, etc.

<table>
<thead>
<tr>
<th>No.</th>
<th>Quantity</th>
<th>Description</th>
<th>Unit</th>
<th>Prev. Total</th>
<th>Accept/Return</th>
<th>Reject</th>
<th>Date Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>3</td>
<td>Item 50001 - Vinyl Gloves - Small - 100/box</td>
<td>box 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Thu, 18 Jan, 2018</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Item 16120 - Radiology Supplies - 25/box</td>
<td>box 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Thu, 18 Jan, 2018</td>
</tr>
</tbody>
</table>

NOTE: When purchasing non-material items or products that will be received over time (subscriptions, dues, services, etc.) you will “receive” these purchases immediately in eVA once fully approved.

AND

Invoice should be sent to A/P with EP# referenced.
Denied Orders

- Approver
- Office of Sponsored Programs
- International Tax Office

Banner integration Errors

- No Vendor Match
- Closed Fiscal Period
- Fund/ORG authorization
- Document Contains Errors (everything else)

You can review comments by opening the PR and selecting the “History tab”
Change Order Process

Change orders must be processed if the transaction total differs by 10% or $199 from the original.

The first change to an order will add the suffix “V2” to the order title. The next change to the same order will reflect “V3.”

- An order may only be changed three times.
- A new order must be created for subsequent changes.
International Tax Matters

The International Tax Office is responsible for ensuring the University complies with U.S. tax and immigration law when making payments to or on behalf of its foreign visitors, vendors and in some instances, payments for services outside the U.S.

https://fiscal.gmu.edu/internationaltax/
eVA Resources

Customer Support

• eVA administrative team: evaadmin@gmu.edu, 3-2580 - eVA customer support team; questions regarding eVA entries/creating purchase orders, technical support for eVA

• Purchasing: purchap@gmu.edu - for all signature cards, information for Org creation/inactivation

  papadmin@gmu.edu - for all W8’s, W9’s creation of G#’s, register into eVA, address changes in Banner/eVA, reactivate vendors

• Training: Jessi Adams, jadams15@gmu.edu, 3-5966

Finance Admin. Systems Team (FAST): fast@gmu.edu

eVA request form: https://fiscal.gmu.edu/wp-content/uploads/2013/04/eVALoginRequestForm.pdf
Hands on eVA demo!


Username: gmu___
Password: eVAttrain7