Basic eVA Purchasing
A Guide to Purchasing Goods and Services with
Virginia’s Electronic Procurement System

Prepared by the Fiscal Services Training Department

July 2017
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Purchasing Policy

Individuals who procure goods and services at George Mason University are required to complete these purchases through eVA, Virginia’s electronic procurement system. This manual provides an overview of the university purchasing policy, guidance for utilizing the eVA procurement system and procedures for securing goods and services. Additional resources are available on the Fiscal Services website at Use eVA Purchasing.

University Policy Number 2106 details the University’s policies and procedures related to the purchase of goods and services. The full text of the policy is included in Appendix A of this manual and is also available on the Fiscal Services website at Purchasing Policy. The Purchasing Office is responsible for purchasing and leasing all goods and services for the University that cost $2,000 or more. The $2,000 threshold applies to the total cost of the purchase, regardless of the number of payments made to the vendor or service provider.

Policy 2106 delegates purchasing authority for dollar amounts less than $2,000 to certain employees at the department level. Purchaser with this less than $2,000 purchasing authority are required to purchase goods and services, except those specifically exempted by the Commonwealth of Virginia, using the eVA procurement system. Purchasing contracts for mandatory suppliers must be honored under this policy. A current list of purchasing contracts is available on the Fiscal Services website at Search for an Existing Contract.

Additional information about the Mason purchasing processes is available in the Purchasing Made Easy Manual at Purchasing Made Easy Manual.

eVA Access

Users of the eVA system must review and sign the Acceptable Use Policy created by the Commonwealth when requesting access to the eVA system. This policy is located in Appendix L of this manual and at Forms and Instructions.

The eVA Login Request Form, located at Forms and Instructions, must be completed and include signatures of the applicant’s supervisor, as well as their Banner liaison. The attached Acceptable Use Policy acknowledgement must be signed by the applicant and his/her supervisor. It should be saved with the title “eVA access for lastname” (with the applicant’s last name in the title) and emailed as an attachment to the Finance Administrative Systems Team (FAST) at fast@gmu.edu. The signature sheet may be faxed to FAST at 3-2920. Applicants will receive a notice when access has been granted. New users will login to eVA using their Mason Net ID and password (used for PatriotWeb).

This state-issued form has been modified for Mason users purchasing items less than $2,000. The applicant should list a current “deliver to” address that includes the building name, room number, and mail stop number. Only those fields listed as mandatory and in bold are required to be completed.

The user will then access the eVA e-Mall application on the eVA homepage at www.eva.virginia.gov and select “Buyer Login”.

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Select the second “Log In” option which states “Login with your Agency account.” Then, select “GMU Identify Provider” and click “Continue.” The user will then be prompted to enter his/her Mason Net ID and password (used for PatrioWeb).

User Preferences
To change user preferences, log into eVA and select the Preferences link on the Knowledge Center page. Three user preference options are available to change/update:

1. User Information: Includes e-mail address and phone number
2. Password Change
3. Manage P-Card: Enter or make changes to P-Card information. Steps for changing this information are located at the Fiscal Services website in Learn About P-Card & eVA page or at P-Card Instructions.
**eVA Basics**

eVA is an electronic procurement tool. It is the web-based procurement system that supports the Commonwealth’s decentralized purchasing environment. Purchasers at Mason use the eVA e-Mall application to purchase goods and services that cost less than $2,000. This application allows items to be purchased through an integrated web-based “Punch-Out” catalog or ordered as “Non-Catalog items” identified in a vendor’s independent online or paper catalog. Orders are submitted electronically to a number of registered vendors. If the vendor does not accept electronic orders, the purchaser must submit the order by fax or mail.

**Commonly Referenced eVA Terms**

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization Code</strong></td>
<td>This refers to the six-digit department identifier. Organization codes include all codes beginning with numbers other than 2 or 9. An organization OR fund code (but not both) is required to process an eVA order.</td>
</tr>
<tr>
<td><strong>Fund Code</strong></td>
<td>This refers to the six-digit identifier for sponsored projects or capital projects. Fund codes begin with either 2 or 9. An organization OR fund code (but not both) is required to process an eVA order.</td>
</tr>
<tr>
<td><strong>Account Code</strong></td>
<td>This code classifies expenditures by type. The expenditure account codes used in eVA begin with a 7. A listing of these codes may be found in Appendix K or on the Fiscal Services web site at <a href="#">Expenditure Account Codes</a>. An account code is required to process an eVA order.</td>
</tr>
<tr>
<td><strong>Commodity Code</strong></td>
<td>The NIGP Commodity Code is a numeric code from the numbering system used by the Commonwealth of Virginia to categorize the products and services purchased. A commodity code for each item is required to process an eVA order.</td>
</tr>
<tr>
<td><strong>PunchOut Catalog</strong></td>
<td>A PunchOut catalog is a vendor catalog embedded in eVA. It allows purchasers to “PunchOut” items from a vendor’s on-line catalog. All item and vendor information is returned in eVA format.</td>
</tr>
<tr>
<td><strong>P-Card</strong></td>
<td>This is the reference to the Purchase Card in eVA. P-Card information must be manually entered in eVA initially and will then become the default payment method.</td>
</tr>
<tr>
<td><strong>Requisition</strong></td>
<td>A requisition is the starting point of an order. It is an internal document and should not be sent to the vendor or Accounts Payable. It is identified by the prefix PR.</td>
</tr>
<tr>
<td><strong>Direct Order (EP#)</strong></td>
<td>A direct order is indicated by the prefix “EP” in eVA. Direct orders are billed directly to Accounts Payable by the vendor. A direct order is issued when the purchaser does not have a P-Card or does not use his/her P-Card for the purchase. A direct order is also issued when the vendor does not accept P-Cards. In order to receive payment, the vendor must have a Mason G#. Users should conduct a <a href="#">G# lookup</a> prior to completing the order.</td>
</tr>
</tbody>
</table>
**Purchase Card Order (PCO#)**
A purchase card order is indicated by the prefix “PCO” in eVA. These are orders placed in eVA with a P-Card. Charges are billed immediately to the purchaser’s P-card account.

**Purchase Order (PO) Category**
This is a reference to the type of eVA order. The PO category is **R01** for all routine purchases. If the purchase is (as noted below) exempt from the fees associated with eVA, the PO category is **X02**.

**Procurement Transaction Type**
The procurement transaction type defines the type of procurement that a requisition is addressing. The most common selections are **20-Supplies-Non-Technology** and **30-Non-Professional Services – Non-Technology**.

**Self-Registered Vendor**
This is a vendor that is registered in eVA and has agreed to pay all fees that may apply.

**State-Entered Vendor**
This vendor is not registered in eVA but has been paid by the state in the past. All location information has been recorded in eVA.

**Un-Registered Vendor**
This is a first-time vendor, one that has never been paid by the state.

*Additional requirements apply before a unit may order from an un-registered vendor.*

**SWaM Vendor**
The term “SWaM” refers to Small, Women, and Minority owned businesses. The use of SWaM vendors is encouraged.

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**State Mandated Purchases**
The Commonwealth of Virginia requires all state agencies, including colleges and universities, to process purchase transactions through eVA. This applies to all funding sources within the university. A vendor must be registered with eVA before a purchase may be completed. Agencies and vendors pay applicable eVA fees. If a purchaser procures goods or services from a vendor who is not established in eVA, non-compliance penalties may apply for the university. Compliance with these and other state mandated purchases is upheld by the Fiscal Services Office. If a purchase meets one of the exemption criteria established by the state (listed below) then the purchase does not have to be completed through eVA procurement.

**eVA Exemptions**
Most goods and services must be purchased utilizing eVA, however, some exceptions exist. A complete and current listing of state exemptions may be found in Chapter 14 of the Agency Procurement and Surplus Property Manual (APPSM) located on the DGS website ([DGS Manuals](https://dgsmmanuals.dgs.virginia.gov/)).

Additional information may also be found in the Purchasing Made Easy manual, located at [Purchasing Made Easy Manual](https://www.purchasing.eva.virginia.gov/pme/). An [eVA Exemption Guide](https://www.purchasing.eva.virginia.gov/pme/) is also available for quick reference.

The list below contains common Mason purchases that are exempt from eVA procurement:

1. Individual travel and lodging
2. Registration fees for conferences
3. Small over-the-counter purchases made with the P-Card. Purchases must be made at the site of the sale and picked up by the cardholder. This does NOT include orders placed on a vendor’s website or by telephone.

4. Reimbursements (limited, see Reimbursement Guidelines)

5. Honorarium payments less than $2,000

6. Moving and relocation expenses paid directly to the traveler (contracted moving van services paid directly to a vendor by Mason require entry into eVA)

7. Department of Homeland Security

8. Postage (this includes mailing services such as FedEx and UPS)

9. Business Cards: Must be purchased using a P-Card online at Business Cards. The Mason Purchasing Office has issued a blanket eVA order to Worth Higgins, the business card vendor, therefore no eVA order is required.

The items listed below are exempt from eVA fees. **These items must still be entered into eVA**, however the PO category will be X02 (see above for PO category definition):

1. Professional organization membership dues
2. Entertainment payments to: speakers, lecturers, musicians, and performing artists. This category does NOT include consultants, seminar facilitators or contracted workshop instructors.
3. Honorarium payments of $2,000 or more
4. Accreditation fees and academic testing services
5. Advertisements in newspapers, magazines, journals, radio or television
6. Real estate leases
7. Exhibition rental fees for exhibitions of historical artifacts or works of art
8. Public Utilities (electric, natural gas, water, sewer)
9. Purchases from public auctions (non-electronic)

**eVA Vendors**

Vendors interested in conducting business with George Mason University and other state and local agencies are encouraged to register with eVA. Vendors are assessed a fee for each purchase transaction up to a capped dollar amount. More information on this fee schedule may be found on the eVA website at eVA Billing. Occasionally, an eVA listed vendor may not have a Mason G#. This means that the vendor is self/state registered in eVA but Mason has never done business with them. Users should perform a G# lookup anytime an order will be directly billed to the university and paid by Mason’s Accounts Payable department.

**Benefits for Vendors**

Vendors may publish a PunchOut catalog in eVA. This provides purchasers an opportunity to view the vendor’s merchandise. Small, Women and Minority-owned (SWaM) businesses benefit from improved access to state procurements. The Prompt Payment Act requires agencies to pay a vendor within 30-days of receiving the goods/services or an invoice (whichever is later). The use of eVA reduces the costs related to collecting fees and payments from purchasers. Interested vendors should contact the Purchasing Office at 703-993-2089 or purch1@gmu.edu.
eVA Vendor Search

Users should access the vendor search list prior to initiating a purchase requisition in eVA. In addition to verifying that the vendor is registered with eVA (self-registered) or has been paid by the state in the past (state-entered), the user may determine if a vendor is SWAM certified, accepts the P-Card, and/or accepts orders electronically.

To search the eVA vendors list before logging into eVA, users will click on the eVA Vendors link at the bottom of the homepage under Info Center as shown:

![eVA Vendors Link](image)

The user may search the listing by entering any portion of the vendor’s name. For example, if a user wanted to find pizza suppliers, he/she may type “pizza” in the search field. This will bring up all related locations and vendor names.

<table>
<thead>
<tr>
<th>Status</th>
<th>Vendor Name</th>
<th>Address 1</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Accept Credit Cards</th>
<th>Accepts Paper Checks</th>
<th>Accepts Electronic Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Self</td>
<td>Airline Pizza Pizza LLC</td>
<td>4018 Airline Highway</td>
<td>Charity</td>
<td>VA</td>
<td>20151</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Active Self</td>
<td>Belly's Pizza, Inc.</td>
<td>10648 A Bradock Road</td>
<td>Fairfax</td>
<td>VA</td>
<td>22032</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Charlie's Pizza</td>
<td>80 Box 1224</td>
<td>Hamburgh</td>
<td>VA</td>
<td>22003</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>1147 5th Street</td>
<td>Charlottesville</td>
<td>VA</td>
<td>22903</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>508 Stewart St</td>
<td>Charlottesville</td>
<td>VA</td>
<td>22903</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>105 S. Timber View</td>
<td>Broadway</td>
<td>VA</td>
<td>22215</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>1137 Willeit St</td>
<td>Charlottesville</td>
<td>VA</td>
<td>22903</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>204 W Highpoint St</td>
<td>Staunton</td>
<td>VA</td>
<td>24401</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>2827 Staunton Draft Highway</td>
<td>Staunton</td>
<td>VA</td>
<td>24477</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Active Self</td>
<td>Commonwealth Pizza Inc DBA Domino's Pizza</td>
<td>600 N West Street</td>
<td>Bridgeville</td>
<td>VA</td>
<td>22912</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

The far left column, marked Status, will identify vendors as Self (for self-registered vendors) or State (indicating state-entered vendors). The search also specifies the vendor’s acceptance of credit cards or electronic orders. For example, on the right hand side of the screen, a “Y” in the “Accepts Elect Ordering” column indicates that the vendor will accept electronic orders and an “N” in that field indicates that the vendor will not accept electronic orders. Selecting the Vendor ID will give additional details on the vendor including a contact phone number and name for the vendor.
A search may also be performed once a user is logged into eVA by selecting “Vendor List” from the eVA Tools menu.

Orders to Un-Registered eVA Vendors

There are situations when a unit must purchase from a vendor who is not self-registered or state-entered in eVA. The purchaser should attempt to identify a comparable vendor in eVA prior to making a purchase from an un-registered vendor. Purchasing Office buyers (3-2580) are available to assist. The purchaser must document his/her request to the vendor to join eVA and the vendor’s refusal in a comment on the eVA purchase order. If a vendor does not wish to self-register with eVA, the department must receive a substituteW-9 from the vendor and forward it to the Purchasing Office with a note that the vendor needs to be added to eVA. Once this process is complete, the vendor will be listed as a state-entered vendor and the department can then complete the purchase through eVA.

If a vendor chooses to join eVA at the purchaser’s request, he/she may visit the eVA homepage and select I Sell to Virginia button for registration information. The Supplier Diversity Manager (3-2580) is available to assist Mason purchasers with requests for vendors to join eVA or assist a vendor with the eVA registration process. For assistance with processing an order to a vendor who has agreed to register but has not completed the registration process, users may call eVA Customer Support at 3-2580 or email evaadmin@gmu.edu.

Searching for Items to Purchase

To search for items from self-registered eVA vendors, select Search on the Dashboard page and then Catalog from the resulting drop down.
Enter the item desired in the search field on the resulting page and select Search.

The panel on the left side of the screen contains links the purchaser may use to further refine the results of the search based on keywords, category, supplier, manufacturer or price.

Purchasers may also compare two or more items side by side to quickly review the attributes of items to be purchased. On the catalog search result page, click the check boxes on the far left of the items to compare. Click Compare to display the items side by side.
Click Add to Cart to add the desired item to the requisition or Done to return to the catalog search result page.

Split Orders

Purchases exceeding $2,000 must be processed through the Purchasing Office. The $2,000 threshold specified in University Policy 2106 must not be circumvented by “splitting orders”. A split purchase is the breaking down of a single purchase into two or more separate transactions that appear to circumvent the single purchase limit and the resulting requirement to submit the purchase to the Purchasing Department for award. Purchases may be identified as split purchases when:

- 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 those purchases exceed the single purchase limit

An example of a split order would be the purchase of a conference table and matching chairs for a total of $2,200 that is placed in two parts: a $1,500 order for the conference table that is followed by a $700 order for the matching chairs.

Mason Purchase Card (P-Card)

A P-Card may be used to place orders with eVA vendors who accept it as a form of payment. The P-Card is the preferred payment method since it reduces paperwork and expedites payment to the vendor. Once a P-Card payment is processed in eVA, the purchaser must allocate the transaction in the Bank of America Works system to complete the process. P-Card information must be manually entered/added in the eVA system at least one day before the card is utilized for eVA purchases. To enter P-Card information log into eVA, select Preferences on the eVA Knowledge Center page. Select Manage P-Card Information and create a new P-Card entry. Complete the information requested below. Additional information is available on the Manage P-Card Information guide.
A P-Card alias is a reference name the purchaser uses to identify the card in eVA, such as the user’s last name and last 4 digits of the P-Card (example: strange8767). Punctuation marks may not be used in this field. The liability and type fields should remain as shown. Enter the expiration date in this format: MM/DD/YYYY. Enter the last day of the month for DD. For example if the expiration date indicated on the credit card is 10/18, enter 10/31/2018.

P-Card information does not automatically update in eVA. If the P-Card expires, the purchaser must enter the new expiration date and card number following the steps above. If the purchaser moves to a new department, he/she must delete the previous department card and then add new card information following the steps above. New and updated P-Cards will be available for use the following day.

Banner Finance Integration

Banner Finance is a comprehensive information system comprised of finance, human resources and student modules. The finance module of this administrative software is used to record financial transactions resulting from activity at the university. All direct bill purchases made through eVA (not using a P-Card), for which Accounts Payable will issue payment, will integrate with Banner Finance and appear as an encumbrance on the fund/org being charged once approved by the fund/org approver for the unit. User should perform a G# lookup if the order will be directly billed to Accounts Payable to ensure the vendor has a Mason G#.

Purchases made in eVA with a registered P-Card will be recorded in Banner Finance when the transaction is approved by the supervisor in the Bank of America Works system. Approval by the fund/org approver is not required in eVA for transactions paid for with a P-Card.

Bypassing ERP Integration

The Bypass EPR Integration box appears on the Add Title screen when creating a requisition.
Generally, eVA requisitions integrate with Banner Finance, and generate an encumbrance, or a promise to pay. However, if a P-Card is used to pay for a purchase online, outside of eVA through a vendor’s website or over the phone, the order must be recorded in eVA, unless it is specifically exempt (see eVA Exemption Guide). When an online or phone purchase is recorded in eVA, it is called a confirming order. To process a confirming order the user must check the Bypass ERP Integration box and the Confirming Order; Do Not Duplicate box. Additional information regarding confirming orders is available in Confirming Order section of this manual and online at Confirming Order.

The purchaser would select Bypass ERP Integration when:

- Entering a Confirming Order, where the P-Card was used for the actual purchase made outside of eVA
- Ordering from an international vendor (Additional information may be found at International Tax Office)

Processing Payments in eVA

Routine purchases of goods and services, payments for dues, subscriptions and services previously provided are processed in eVA. In these situations, the department may have received an invoice directly from the vendor that is to be processed for payment. When a check is required, enter the payment in eVA following the appropriate process listed below based on the vendor status: self-registered, state-entered or un-registered. The invoice may be scanned and attached to the eVA order, but the invoice with the EP number (purchase order) noted should also be sent to Accounts Payable at acctpay@gmu.edu.

Shipping and Delivery Charges

If an eVA order includes a charge for shipping or freight or if there is a delivery fee associated with the order, each of these items should be entered as an individual line item and not simply combined with the price of the ordered item. Additionally, shipping/freight and delivery fees have unique commodity codes. The commodity code for shipping or freight charges is 96286. The commodity code for a delivery fee is 96750.
Copying Requisitions

eVA allows purchasers to copy entire requisitions to avoid repetitive data entry. This option is especially useful when ordering from an un-registered vendor. In this case, if the order is not copied from a previous order, the purchaser must enter all of the vendor’s information again, such as address, contact, email address, phone number and tax ID number. Copying a previous requisition is more efficient, preventing the entry of this data a second time.

To copy an order, find the order to be copied in the My Documents window on the Dashboard page and click on the PR number or the title of the requisition. On the requisition page, select the Copy button at the top.

The system will then make a copy of the previous requisition and will title it “Copy of…” the original name.

The purchaser will then review the details of the requisition and make changes as needed.

- Modify the title, removing the words “Copy of”
- Change the fiscal year (if applicable)
- When copying an order that a Purchasing Department purchaser issued (those orders costing $2,000 or more), the unit purchaser should confirm that his/her name (and not the name of the Purchasing Department Buyer) appears in the “on behalf of” window by selecting his/her name from the drop down.
- Select Edit, Copy or Delete to change line items within the requisition (similar to the process when copying a single line item detailed earlier)

Click Submit to send the new requisition to the purchaser’s approver

**Searching for Requisitions**

Purchasers may search for a previous requisition in a number of ways. If a label was applied to the requisition when it was created, the purchaser may select Search from the Dashboard page, then Requisition from the drop down list.

Under My Labels in the left panel, click on the label of the requisition desired. A list of requisitions with that label will appear.

If the requisition does not have a label applied to it, simply type in part of the requisition title in the Title field and select Search. All requisitions containing the word(s) in the title field will appear.
Types of eVA Orders

The purchasing process at Mason depends upon two criteria: method of payment (is the purchaser using a P-Card or is Accounts Payable going to issue a direct payment to the vendor) and the vendor’s eVA status (is the vendor self-registered in eVA, state-entered in eVA or un-registered in eVA). Quick Reference Guides for each type of order are available in the Appendix and may be found on the Fiscal Services web site at Obtain Training Material.

Before beginning an eVA order, the purchaser determines what vendor is to be used and obtains the following information about that vendor:

- Is the vendor self-registered with eVA? State-entered? Un-registered?
- Does the vendor accept the P-Card?
- Does the vendor accept electronic orders?
- Does the vendor have a Punch-Out catalog in eVA? To search from the Dashboard sub menu select Search, then select Catalog, and choose Punch-Out catalogs. A listing of vendors with Punch-Out catalogs will generate

When the information necessary to process the order is available, login to eVA and begin the order process. The ordering process beings with the creation of a requisition (PR#) and is completed once the order is approved and an order number (EP# or PCO#) has been issued. On the eVA Welcome page, select eMall/eForms to access the eVA eMall application. An explanation of each section of the Dashboard is provided below.

- **Common Actions: Create - Requisition:** This option allows the purchaser to create a new order in eVA. The purchaser will click on “Requisition” to begin the order.
- **Recently Viewed:** This option will reference the items/orders most recently viewed by the user.
- **To Do:** This window contains orders that have been submitted in eVA but require approval before the order is complete. The purchaser will have to approve each Confirming Order that he/she enters. If the vendor does not accept electronic order submission, the order will usually appear in the purchasers To Do list to indicate that the unit purchaser must print a copy of the order and send it to the vendor via fax or mail.
- **Requisitions - Composing:** This window contains orders which have not been submitted or orders that were submitted but failed integration and must be corrected and resubmitted.
- **Requisitions - Submitted:** This window contains orders which have been submitted but are not yet approved.
- **Requisitions - Denied:** This window contains orders which have been denied.
- **My Documents:** This window contains orders which have been fully approved, as well as orders from all sections noting the order status. Purchasers will locate an order from the My Documents section to obtain the purchase order number (EP# or PCO#).

**Punch-Out Catalog Order**

Use this process for vendors, such as The Supply Room Companies and Dell, who have a Punch-Out Catalog in eVA. A Punch-Out catalog is an electronic resource which integrates the vendor’s online ordering system with the eVA system. Purchasers are “punched out” of eVA to shop as if they were on the vendor’s independent web site. When checking out, the item information, vendor information and
Commodity codes are extracted and input into the system in an eVA friendly format. Quick Reference Guides for Punch-Out Catalog Orders are available at Obtain Training Materials.

Creating a Requisition: From the Dashboard page, under the top left “Create” section click on Requisition. This will take the purchaser to the Title screen. The purchaser may enter the vendor’s name and purchase date as the title of the requisition. Some units also enter fund/org numbers in the order’s title. This allows the purchaser to search for the order in the future. Although it is possible to process orders to multiple vendors through the same requisition, it is recommended that purchaser use one vendor per order.

If the purchaser has registered a P-Card in eVA, it will become the default payment method. If the proposed vendor does not accept the P-Card or if the purchaser would prefer not to use the P-Card for this purchase, he/she will uncheck the “Use P-Card” box and process a direct order that will be paid by Accounts Payable.

The PO Category for Punch-Out catalog orders should be set to R01.

Select a Procurement Transaction Type from the dropdown. The categories most frequently selected will be 20-Supplies-Non-Technology (most book, office, lab and student event supply purchases such as pizza for student events and similar items, as well as all purchases from The Supply Room Companies, including purchases of printer cartridges and batteries) and 30-Non-Professional Services – Non-Technology (consultants, guest speakers, entertainers, membership dues, subscriptions, hotels, bus transportation, catering, advertising and similar type transactions). When an eVA order consists of more than one procurement type, purchasers should select the type that represents the largest dollar amount of the order. Examples of procurement transaction type categories may be referenced at Procurement Transaction Type.

The Bypass ERP Integration box and Confirming Order; Do Not Duplicate box should not be checked for Punch-Out Catalog orders

As an optional feature, the purchaser may choose to apply a label to the requisition. A label acts as a “quick search” to find and display a list of all items that have the same tag or label. The purchaser would choose Apply Label and either choose a label that has already been created (if any exist) or choose New Label and create one.
Select Next to go to the Add Items screen.

**Adding Items:** On the *Add Items* screen, there will be a list of links to various types of items. To utilize a Punch-Out catalog, the purchaser may type the vendor name in the *Search* field or select *PunchOut Catalogs* to view a list of vendors who have supplied eVA with a Punch-Out catalog. When the purchaser has located the desired vendor, he/she will select the vendor name to access the vendor’s PunchOut catalog.

![Adding Items Screen](image)

eVA will direct the purchaser into the online catalog for the selected vendor. Some vendors, such as The Supply Room Companies, will have a quick order form as part of the catalog allowing the purchaser to enter item numbers for the items he/she will purchase. The purchaser may also browse the catalog for the items he/she would like to purchase. When browsing a catalog, the purchaser should take note of the unit of measure for items being purchased. Once all items have been selected and placed into the shopping cart, the purchaser may submit the order to eVA by selecting “Submit Cart.” This checkout process allows eVA to extract the purchase information detail and enter it into the eVA friendly format.
Adding Accounting Details: Accounting details, including fund or org number and account code, are required elements in the eVA order process. The eVA system will not finalize the purchase without the appropriate accounting information.

To add accounting details select the Checkout button. Scroll down to the line-items list and select the checkbox next to “No. Type”. This will select all the items and allow the user to enter the fund/org information for all items at one time. If items will be billed to different funds/orgs, select the items separately and complete the allocation for each item, one at a time. Once the items are selected, click the Edit button to add information to the accounting field. For purchasers using Mozilla Firefox with more than 14 items in the cart, this step may need to be repeated for each page of items. The page numbers may be found on the right side of the screen above the first line item.
The required elements on this page include an organization or fund number (but not both) and an account code. The organization or fund code indicates the department, organizational unit or project that will be charged for the purchase. The purchaser should enter only an organization or fund code that he/she is authorized to charge. The account code is a 5 digit code used to classify the purchase by expenditure type. For example, the account code for office supplies is 74120. A list of commonly used expenditure account codes is located on Fiscal Services website at Expenditure Account Codes. The activity code is an optional element used by cost-sharing units.

To charge more than one fund or org number, the purchaser may use the Split Accounting function. Once the purchaser has entered the necessary accounting codes, he/she will select Next at the bottom of the page. If prompted to confirm Modified Fields, select Done. The user will return to the Summary page.

Checkout/Submission: The checkout screen allows the purchaser to review the details of his/her order including the title, payment method, and the item descriptions and prices (Hint: If a commodity code is missing, follow the instructions under non-catalog orders to enter the appropriate value). Purchasers should enter a Need-By date to ensure the contractual responsibility of the vendor to deliver the items. Usually, a date one week from the order date is appropriate although orders to The Supply Room Companies-GMU are generally delivered on the next business day.

This page also provides the purchaser with an opportunity to include comments on the purchase order for the vendor to review. If a purchaser would like to include a comment to the vendor, he/she will select the box for “Visible to Supplier” after entering the comment. Purchasers should select “Mark as Proprietary...” for comments intended to be viewed only by the Purchasing Office and/or other Mason staff. Once the order information has been reviewed, select Submit.
If the order was paid with a P-Card in eVA then no fund/org approval is required. The purchaser will need to Approve the order in eVA before a purchase order number is issued. For non-P-Card orders, directly billed to Mason by vendor invoice, the fund/org approver must Approve the order in eVA before a purchase order number is issued. For P-Card purchases the eVA order number (EP# or PCO#) must be recorded in Bank of America Works to the appropriate transaction.

When the order is approved, and if the vendor accepts orders electronically, the order will be electronically transmitted to the vendor and be located in the My Documents window on the Dashboard page. The order will be located in the Submitted window until it is approved. If the order is not approved, it will be returned to the Denied window. If the order fails integration, it will be returned to the Composing window. If the vendor does not accept orders electronically, once approved the order will appear in the To Do section for the purchaser to print, fax or mail the order to the vendor. The purchaser will receive email communication from Ariba (eVA) related to the order status.

To approve an order, select the PR number under To Do from the eVA Dashboard. Select the green approve button and then “OK”. Once approved, the order will be located in the My Documents window on the Dashboard page. To return to the Dashboard page, select Home.
To print a copy of the order,

1. Find the desired PR number in the My Documents window and select it
2. Find EP or PCO number and select it
3. Select Print

For step-by-step instruction on processing a PunchOut catalog order, there are two Quick Reference Guides available. If the purchase is to be completed using a P-Card, refer to the Quick Reference Guide for PunchOut Catalog (P-Card). If the purchase is to be completed without a P-Card and Accounts Payable will pay the vendor directly, refer to the Quick Reference Guide for PunchOut Catalog (bill to Accounts Payable).

Non-Catalog Order

Many vendors register with eVA but do not provide a PunchOut catalog. Purchasers may view the item information on the vendor’s independent website or paper catalog and manually enter each item into eVA.

Creating a Requisition: Before beginning a requisition purchasers should complete a vendor search to determine if the vendor is registered in eVA. Follow the process outlined below for self-registered or state-entered vendors (eVA listed vendors). The process for vendors who are un-registered in eVA is explained later in this manual.

From the Dashboard page, under the top left “Create” section click on Requisition. This will take the purchaser to the Title screen. The purchaser may enter the vendor’s name and purchase date as the title of the requisition. Some units also enter fund or org numbers in the title. This allows the purchaser to search for the order should it need to be referenced in the future. Although it is possible to process orders to multiple vendors through the same requisition, it is recommended that purchasers use one vendor per order.

If the purchaser’s P-Card is registered in eVA, it will be the default payment method. If the proposed vendor does not accept P-Card or if the purchaser would prefer not to use the P-Card for this purchase, he/she will uncheck the Use P-Card box and process a direct order that will be paid by Accounts Payable.

The PO Category should be set to R01 if the purchase is for a routine item. If the order is for an item exempt from eVA fees (see eVA Exemption Guide), the PO category should be X02.
Select a *Procurement Transaction Type* from the dropdown. The categories most frequently selected will be **20-Supplies-Non-Technology** (most book, office, lab and student event supply purchases as well as pizza for student events and similar items, as well as all purchases from The Supply Room Companies including purchases of printer cartridges and batteries) and **30-Non-Professional Services – Non-Technology** (consultants, guest speakers, entertainers, membership dues, subscriptions, hotels, bus transportation, catering, advertising and similar type transactions). When an eVA order consists of more than one procurement type, purchasers should select the type that represents the largest dollar amount of the order. For examples of items in the other procurement transaction type categories, refer to the [Procurement Transaction Type](#).

If Accounts Payable is paying the vendor directly for the order the Bypass ERP Integration box should not be checked. If the P-Card box is checked, indicating that a P-Card is being used for the purchase, eVA will automatically bypass integration. In those P-Card purchase situations, it is not necessary to check this box.

As an optional feature, the purchaser may choose to apply a label to the requisition. A label acts as a “quick search” to find and display a list of all items that have the same tag or label. The purchaser would choose *Apply Label* and either choose a label that has already been created (if any exist) or choose New Label and create one.

Select *Next* to go to the Add Items screen.

Adding Items: When processing a non-catalog order, the purchaser may either manually enter the item information from the vendor’s paper or independent online catalog (detailed below) or search for the items using the *Search* feature in eVA.
When manually entering item information from a vendor’s paper or independent online catalog, each item will be entered as a separate non-catalog item. For example, if purchasing two items, this step will be repeated twice.

To enter the item information, select Create Non-Catalog Item as shown:

![Create Non-Catalog Item](image)

The following fields are required for each item:

- **Item Description**: The purchaser will indicate the item number and description as it is displayed in the vendor’s print or online catalog.
- **NIGP Commodity Code**: A numeric code used to describe the product or service must be selected. The purchaser may choose to look-up commodity codes prior to logging into eVA and placing the order by using the **NIGP Code Lookup** found on the eVA homepage (before login). The commodity code listing may be accessed from the Resource section found at the bottom of the eVA home page as shown:

![NIGP Codes](image)
The purchaser may search by any part of an item description to locate an appropriate commodity code and select the code that best matches the product or service being purchased. It is not necessary to locate an exact match for the item. Make a note of the five-digit number from the search.

OR

While placing the order in eVA, the purchaser can select Search for more from the NIGP Commodity Code drop down list, enter the item descriptions and select Search. Click the Select button on the far right next to the desired search result. Choose the code which most closely represents the item being purchased. If additional assistance is needed in locating desired commodity codes, please contact Mason’s eVA Customer Support at 3-2580.

- **Supplier:** In the Supplier field select Search for More from the drop-down menu. Type the Vendor name into Search box. To select a vendor, click the Select button next to the desired search result. Once the vendor is selected, the contact and other information for that vendor should populate the Location field. If the Location field does not populate automatically, this usually means that there is more than one office or location for this vendor in eVA. Click the select button next to the Location field. In the resulting window, select the desired location. The Reg. Type field below the Location field will populate with either Self-Registered or State-Entered depending on the vendor’s status.

- **Supplier Part Number:** Enter the item number provided by the vendor for the item being purchased.
- **Quantity and Unit of Measure**: Enter the desired quantity for each item and indicate the appropriate unit of measure per the vendor’s catalog.
- **Price**: Enter the price per unit for the item and click *Update Total*.

Once all information has been entered, Select *OK*.

If more than one item is being ordered from this vendor, the purchaser will either repeat the steps above for each subsequent item to be purchased or the line item he/she has just created may be copied to avoid entering the vendor contact data again. Copying lines is performed from the shopping cart screen. To access the shopping cart, click the cart icon on the *Add Items* screen.

To copy a line item, from the shopping cart screen, put a check mark in the box next to the single item and click the *Copy* button.

The system will copy the line item and the shopping cart will show two of the same item—
To update the copied line item, place a check mark in the box next to the copied item, marked with a 2, and select *Edit*.

On the *Line Item Detail* screen, update the fields that have changed for the new item. Usually the description, quantity, unit of measure, price and commodity code will need to be updated for the new item. Since the same vendor is being used, the contact information entered for the first item has been “copied” and it is not necessary to enter it again.
Select OK and then click the Shopping Cart icon on the Add Items page. The Shopping Cart will now reflect both of the items correctly.

Users may continue copying lines until all desired items are in the shopping cart.

Adding Accounting Details: Accounting details, including fund or org number and account code, are required elements in the eVA order process. The eVA system will not finalize the purchase without the appropriate accounting information. To view the shopping cart, click on the cart icon.
To add accounting details from the eVA shopping cart, select the checkbox next to “No. Type”, above the list of line-items. Scroll down and select Edit to view the accounting fields.

The required elements on this page include an organization or fund number (but not both) and an account code. The organization or fund code indicates the department, organizational unit or project that will be charged for the purchase. The purchaser should enter only an organization or fund code that he/she is authorized to charge. The account code is a 5-digit code used to classify the purchase by expenditure type. For example, the account code for office supplies is 74120. A list of commonly used expenditure account codes is available on the Fiscal Services website at Expenditure Account Codes. The activity code is an optional element used by cost-sharing units.

To charge more than one fund or org number, the purchaser may use the Split Accounting function. Once the purchaser has entered the necessary accounting codes, he/she will select OK at the bottom of the page. If prompted to confirm Modified Fields, select Done, then Done again on the Shopping Cart page. This will return the purchaser to the add items screen. The purchaser may proceed by selecting Checkout.

Checkout/Submission: The checkout screen allows the purchaser to review the details of his/her order including the title, payment method, PO category and the item descriptions and prices. The purchaser
should enter a Need-By date to ensure the contractual responsibility of the vendor to deliver the items. Usually, a date one week from the order date is appropriate.

This page also provides the purchaser the opportunity to include comments on the purchase order for the vendor to review. If a purchaser would like to include a comment for the vendor he/she will select the box for “Visible to Supplier” after entering the comment. Purchasers should select “Mark as Proprietary…” for comments intended to be viewed only by the Purchasing Office and/or other Mason staff. The final step of the process is to select Submit which will send the order for approval.

If the order was paid with a P-Card in eVA then no fund/org approval is required. The purchaser will need to Approve the order in eVA before a purchase order number is issued. For non-P-Card orders, directly billed to Mason by vendor invoice, the fund/org approver must Approve the order in eVA before a purchase order number is issued. For P-Card purchases the eVA order number (EP# or PCO#) must be recorded in Bank of America Works to the appropriate transaction.

When the order is approved, and if the vendor accepts orders electronically, the order will be electronically transmitted to the vendor and be located in the My Documents window on the Dashboard page. The order will be located in the Submitted window until it is approved. If the order is not approved, it will be returned to the Denied window. If the order fails integration, it will be returned to the Composing window. If the vendor does not accept orders electronically, once approved the order will appear in the To Do section for the purchaser to print, fax or mail the order to the vendor. The purchaser will receive email communication from Ariba (eVA) related to the order status.

To approve an order, select the PR number under To Do from the eVA Dashboard. Select the green approve button and then “OK”. Once approved, the order will be located in the My Documents window on the Dashboard page. To return to the Dashboard page, select Home.
To print a copy of the order,

1. Find the desired PR number in the My Documents window and select it
2. Find EP or PCO number and select it
3. Select Print

If the purchase is to be completed using a P-Card, refer to the Quick Reference Guide Noncatalog Orders (P-Card).

If the purchase is to be completed without a P-Card and Accounts Payable will pay the vendor invoice, refer to the Quick Reference Guide for Noncatalog Orders (bill to Accounts Payable).

Confirming Orders (Billed to a P-Card)

Occasionally, a vendor’s website contains essential ordering details and features that make the vendor’s website a more efficient method of purchasing items. A common example is the purchase of customized merchandise. The order may initiate on the vendor’s website and be paid with a P-Card on the vendor’s website or by telephone. To be in compliance with state regulations a confirming order, or record of the purchase, must be entered in eVA during the same credit card billing cycle as the purchase.

Creating a Requisition: From the Dashboard page, under the top left “Create” section click on Requisition. This will take the purchaser to the Title screen. The title of the requisition must start with the phrase “Confirming Order” followed by the vendor’s name and purchase date. Some units also enter fund/org numbers in the order’s title. This allows the purchaser to search for the order in the future. Although it is possible to process orders to multiple vendors through the same requisition, it is recommended that purchaser use one vendor per order.

If the purchaser has registered a P-Card in eVA, it will become the default payment method. When processing a Confirming Order, the Use P-Card box should be unchecked.
The PO Category should be set to R01 if the purchase is for a routine item. If the order is for an item exempt from eVA fees (see eVA Exemptions), the PO category should be X02.

Select a Procurement Transaction Type from the dropdown. The categories most frequently selected will be 20-Supplies-Non-Technology (most book, office, lab and student event supply purchases such as pizza for student events and similar items, as well as all purchases from The Supply Room Companies, including purchases of printer cartridges and batteries) and 30-Non-Professional Services – Non-Technology (consultants, guest speakers, entertainers, membership dues, subscriptions, hotels, bus transportation, catering, advertising and similar type transactions). When an eVA order consists of more than one procurement type, purchasers should select the type that represents the largest dollar amount of the order. For examples of procurement transaction type categories, refer to Procurement Transaction Type.

When processing a Confirming Order the Bypass ERP box and the Confirming Order; Do Not Duplicate box must be checked.

As an optional feature, the purchaser may choose to apply a label to the requisition. A label acts as a “quick search” to find and display a list of all items that have the same tag or label. The purchaser would choose Apply Label and either choose a label that has already been created (if any exist) or choose New Label and create one.

Select Next to go to the Add Items screen.

Adding Items: When processing a confirming order, the purchaser will record the order as a single non-catalog item in eVA. Purchasers may select Create Non-Catalog Item to begin.
The following fields are required:

- **Item Description**: The purchaser will indicate the item number(s) and description(s) as displayed in the vendor’s print or online catalog. All items should be noted in the description field since only one non-catalog item will be created in eVA.

- **NIGP Commodity Code**: A numeric code used to describe the product or service must be selected. The purchaser may choose to look-up commodity codes prior to logging into eVA and placing the order by using the *NIGP Code Lookup* found on the eVA homepage (before login). The commodity code listing may be accessed from the Resource section found at the bottom of the eVA home page as shown:

The purchaser may search by any part of an item description to locate an appropriate commodity code and select the code that best matches the product or service being purchased. It is not necessary to locate an exact match for the item. Make a note of the five-digit number from the search.

**OR**

While placing the order in eVA, the purchaser can select *Search for more* from the *NIGP Commodity Code* drop down list, enter the item descriptions and select *Search*. Click the *Select* button.
on the far right next to the desired search result. Choose the code which most closely represents the item being purchased. If additional assistance is needed in locating desired commodity codes, please contact Mason’s eVA Customer Support at 3-2580.

- **Supplier**: In the Supplier field select Search for More from the drop-down menu. Type the Vendor name into the Search box. To select a vendor, click the Select button next to the desired search result. Once the vendor is selected, the contact and other information for that vendor should populate the Location field. If the Location field does not populate automatically, this usually means that there is more than one office or location for this vendor in eVA. Click the select button next to the Location field. In the resulting window, select the desired location. The Reg. Type field below the Location field will populate with either Self-Registered or State-Entered depending on the vendor’s status. See below for Un-Registered Vendors.
  - **Confirming Order for Un-Registered Vendors**: If the vendor is not listed in eVA it is considered an un-registered vendor. **The purchaser will need all of the information from the vendors W-9 form in order to add the vendor to the order.** To process a Confirming Order to an un-registered vendor, choose the “New” button from the Search for More menu.
    - On the next screen, type in the Supplier Name only. Then click Save at the bottom. Press Select next to the new Vendor name on the Search screen.
Click the “Select” option next to the Location field and then “New.”

On the next screen, enter the vendor information for all the required fields (marked with an asterisk *). Then click Save. Press Select next to the new location on the Search screen. The added location should now display. Continue to next step.

- Quantity and Unit of Measure: Quantity should remain as “1” as this item represents the entire order and the unit of measure should remain “each.”
- Price: Enter the total price of the entire order in this field.

Adding Accounting Details: Accounting details, including fund or org number and account code, are required elements in the eVA order process. The eVA system will not finalize the purchase without the appropriate accounting information. To view the shopping cart, click on the cart icon.
To add accounting details from the eVA shopping cart, select the checkbox next to “No. Type”, above the list of line-items then select Edit to view the accounting fields.

The required elements on this page include an organization or fund number (but not both) and an account code. The organization or fund code indicates the department, organizational unit or project that will be charged for the purchase. The purchaser should enter only an organization or fund code that he/she is authorized to charge. The account code is a 5-digit code used to classify the purchase by expenditure type. For example, the account code for office supplies is 74120. A list of commonly used expenditure account codes is available on the Fiscal Services website at Expenditure Account Codes. The activity code is an optional element used by cost-sharing units.

To charge more than one fund or org number, the purchaser may use the Split Accounting function. Once the purchaser has entered the necessary accounting codes, he/she will select OK at the bottom of the page. If prompted to confirm Modified Fields, select Done, then Done again on the Shopping Cart page. This will return the purchaser to the add items screen. The purchaser may proceed by selecting Checkout.
Checkout/Submission: The checkout screen allows the purchaser to review the details of his/her order including the title, payment method, PO category and the item descriptions and prices. The purchaser should enter a Need-By date to ensure the contractual responsibility of the vendor to deliver the items. Usually, a date one week from the order date is appropriate.

This page also provides the purchaser the opportunity to include comments on the purchase order for the vendor to review. If a purchaser would like to include a comment on the purchase order, he/she will select the box for “Visible to Supplier” after entering the comment. The final step of the process is to select Submit which will send the order for approval. When the “Confirming Order; Do Not Duplicate” box is checked a comment will automatically be added.

Once the order is submitted, the purchaser will see the order listed in the To Do window. The purchaser must Approve the Confirming Order before an eVA order number will be issued. If the order fails integration, it will be returned to the Composing window. The purchaser will receive email communication from Ariba (eVA) related to the order status.

To approve the order, select the PR number under To Do. Select the green approve button and then OK. Once approved, the order will be located in the My Documents window on the Dashboard page. To return to the Dashboard page, select Home.
To print or view a copy of the order,

1. Find the desired PR number in the *My Documents* window and select it
2. Find EP or PCO number and select it
3. Select Print (if desired)

When processing a Confirming Order, the purchaser must record the EP or PCO order number in Bank of America Works. The instructions above may be used to locate the order number; however, it is not necessary to attach a copy of the order to the Bank of America Works transaction.

For additional step-by-step information on processing a confirming order, refer to the Quick Reference Guide Confirming Order or Appendix F.

Un-Registered Vendor Orders (Billed to Accounts Payable)
eVA users are required to protect personally identifiable information including the Social Security numbers and Federal Tax ID numbers of consultants, vendors and others in accordance with Federal and State law. These numbers should not be entered on any eVA purchase order except when required to process a Confirming Order for an un-registered vendor as detailed above. These numbers must not be entered in any other field including the item description or comment box on the eVA order. Users should not attach Social Security numbers or Substitute W-9/W-8 forms with other documentation that is attached to an eVA order.

Go to: [http://eva.virginia.gov](http://eva.virginia.gov). Select eVA Vendors (bottom left) and search for proposed vendor. If the proposed vendor is not listed as Active Self or Active State, do not begin the order.

Follow these steps to complete an order to an un-registered vendor when the vendor will invoice Accounts Payable for the purchase.

1. Send an email request to the vendor advising that George Mason University prefers vendors who have self-registered in eVA and reference information available at the eVA Vendor Set-Up link ([https://eva.virginia.gov/cd/files/new-vendor-registration-guide.pdf](https://eva.virginia.gov/cd/files/new-vendor-registration-guide.pdf)). Once vendor registration is complete, the vendor should submit the substitute W-9 or W-8 BEN (foreign) to the unit purchaser who will email it to papadmin@gmu.edu with a note that it relates to a newly registered eVA vendor and a G# needs to be created.

OR

2. A vendor unwilling to self-register in eVA must provide the substitute W-9 or W-8 BEN (foreign) to the unit purchaser who will then email it to papadmin@gmu.edu with a note that the vendor
needs to be state-entered in eVA and a G# needs to be created. The Mason Purchasing staff will initiate the process to set up the vendor as “state entered” and advise the unit purchaser when set-up is complete. Please allow three business days.

a. When the vendor has been set up in eVA, please follow the process for non-catalog orders that will be billed to Accounts Payable

b. Submitted orders to vendors not listed in eVA will be routed to the eVA Support Team who will notify the unit purchaser to follow the steps outlined above.

For additional step-by-step information on processing an un-registered vendor order that is being billed to Accounts Payable, refer to the Quick Reference Guide for Un-Registered Vendor Order (bill to Accounts Payable) or Appendix H.

Orders Costing Over $2,000

Purchases exceeding the $2,000 departmental limitation are processed through the Purchasing Office. The purchaser will enter the order in eVA as a catalog or non-catalog order. If the P-Card is the default payment method, the Use P-Card box should be unchecked on the Title screen. Once the order has been approved by the unit approver, it is transmitted electronically to the Purchasing Office where it will be assigned to a purchasing office buyer. The Purchasing Office Buyer will then place the order. Once the Purchasing Office Buyer becomes involved, the departmental purchaser may view, but not change, the order.

When placing orders over $2,000, it is important to add comments in the Comment field that may assist the Purchasing Office Buyer to complete the purchase. Quotes, drawings or pictures of the desired items should be attached to the requisition by clicking the Add Attachment button and selecting the appropriate documents. The departmental purchaser should also be sure to check the box next to “mark as Proprietary and Confidential” in both the Comments and Add Attachment sections. This will ensure that the comments and/or attachments are seen only by the Purchasing Office Buyer and not by the vendor(s) being considered for the purchase.

For additional step-by-step information on processing an eVA Purchase costing over $2,000, refer to the Quick Reference Guide for Orders over $2,000 or Appendix I.

Denied Orders

A purchaser will occasionally receive a message from Ariba (eVA) indicating that his/her order has been denied.

- The purchaser’s approver may deny the purchase. If this occurs, the approver should write a comment in the appropriate field to inform the initiator of their reason(s) for denial.
- The Office of Sponsored Programs (OSP) may deny the purchase. A representative from OSP should write a comment in the appropriate field to inform the initiator of their reason(s) for denial.
- The International Tax Office may delay approval for foreign vendors if required information is missing.

In other cases, the reason for the order being denied is that it failed to integrate with Banner Finance, the repository for financial transactions at the University.
Common eVA/Banner Finance integration errors are:

- **No Vendor Match** – this error means that the vendor is un-registered and has never been paid previously by the State. This error will occur if the purchaser manually enters the vendor’s information in the Supplier field instead of selecting the registered vendor from the eVA vendor’s list. Occasionlay, purchasers will receive this error if the vendor is self-registered in eVA but has not been paid by Mason. The vendor would need to submit a substitute W-9/W-8 to papadmin@gmu.edu so that the Purchasing Office can create a G# for the vendor. If the request is for a Confirming Order, ensure that the Bypass ERP and Confirming Order; Do No Duplicate box have been checked.

- **Closed Fiscal Period** – this error occurs when orders from previous fiscal years are “copied” and the initiator forgets to change the fiscal year. To correct this error, update the fiscal year to reflect the current fiscal year and resubmit.

- **Unauthorized FOAPAL** – this error occurs when the purchaser is using a fund or org number that he/she has not been pre-authorized to use. When the eVA user profile is created, all funds and/or orgs to which the purchaser will be charging goods and services must be listed. Very often, responsibilities change and different or new funds and/or orgs are added to a purchaser’s job assignment. When this occurs, it is important for the purchaser to update their eVA authorization. Once the new funds and/or orgs are updated in eVA, resubmit the requisition.

- **Document Contains Errors** – This is designed as a “catch all” error code and instruction for resolving the error will be contained in the Ariba (eVA) error email.

Orders denied due to failure to integrate with Banner Finance will be returned to the purchaser’s composing window. The purchaser will go into the order by clicking on the PR number, selecting the History tab and then clicking on Denied. One of the above error messages should then be displayed and the purchaser should correct the error accordingly. However, if the order is denied three times, the purchaser will no longer see the order in their composing window and a new order must be created. For assistance with error resolution please contact evaadmin@gmu.edu.

**The Role of the Approver**

All non-P-Card orders are approved electronically before they are submitted to the vendor or returned to the purchaser to approve, print and fax.

The approval process may be completed in several ways. The **Quick Approval** method is detailed below.

- When approvers receive an email notification from the Ariba Administrator, he/she will click on the link in the body of the email and enter their eVA user name and password
- Select eMall/eForms at the top left
- In the To Do window, locate the requisition and select Approve to the right under the Required Action column.
- Select approve (or deny if appropriate) at the top middle of the screen
- Select OK to confirm approval or denial after entering an optional comment.
- Additional orders awaiting approval will be automatically displayed.
- Select Logout at top right to log out of the system or My Home or Back to return to the Dashboard page.
Some approvers wish to approve or deny requests individually, confirming the accuracy of accounting details such as fund/org and account codes. This method is detailed below.

- When approvers receive an email notification from the Ariba Administrator, he/she will click on the link in the body of the email and enter their eVA user name and password
- Select eMall/eForms at the top left
- In the To Do window, click on the ID or Title of the requisition to review the details of the order from the Approve Summary page. To view Accounting Details, click the Detail button on the right in the line items section. Click OK after confirming accuracy.
- To save and organize requisitions, the approver may select Apply Label and then select a label that already exists or create a new one by selecting Add Label.
- Select approve (or deny if appropriate) at the top middle of the screen
- Select OK to confirm approval or denial after entering an optional comment.
- Select Logout at top right or My Home to return to the Dashboard page.

Some approvers prefer to approve or deny multiple requests at once. This method is detailed below. If the approver chooses this option, he/she cannot review details of the requests.

- When approvers receive an email notification from the Ariba Administrator, he/she will click on the link in the body of the email and enter their eVA user name and password
- Select eMall/eForms at the top left
- In the To Do window, click the View List link and select Approve below. The Approve Requests page lists all requests awaiting approval.
- Click the check box for all requests to be approved or denied. Note that if the approver chooses this mass approval option, the approver cannot review details of the requests.
- To assign a label to these requisitions, choose Assign Label and select a label that already exists or create a new one by selecting Add Label.
- Select approve (or deny if appropriate) at the bottom left of the screen
- Select OK to confirm approval or denial after entering an optional comment.
- Select Logout at top right or My Home to return to the Dashboard page.

There is a video presentation of the Approval process located at Approving an Order Video.

Delegating Approval Authority in eVA

eVA approvers who will be away from the office for an extended period should delegate their approval authority to another eVA user in their absence.

In order to delegate authority, approvers should log into eVA and select eMall/eForms. From the Dashboard page, under Preferences, select Delegate authority as shown below.
On the next screen, complete the fields shown. Use the drop down to select a delegate. The individual selected must already have access to eVA. Select a start date for this individual to begin approving orders. Select the end date that this individual will cease being the approver. Although it is not a required field, approvers are encouraged to put a reason why this temporary delegation is taking place.

Once the Delegate screen is completed, select Next. On the Approval Flow page, select Next. On the Review Changes page, confirm that all information is correct before selecting Submit.

Changes, Cancellations and Returns

If a departmental purchaser changes or cancels an order, or returns some or all of the ordered items, in most cases, those changes should also be recorded in eVA to ensure accurate reporting and fee assessment. When the change represents less than 10% of the order amount up to $199.99, the purchaser is NOT required to enter the changed information in eVA.

Change Orders: A purchaser may change any part of an order by adding or deleting items, or changing the quantity or price of items after submitting the order in eVA. The purchaser should initiate a change order in eVA and call the vendor immediately to verify the changes, referencing the new order number.
To begin the change order process, log-in to eVA and select eMail/eForms. Locate the order in the *My Documents* window and select the PR number of the order to be changed. Select *Change* as displayed below:

The purchaser may change a line item by selecting the checkbox next to the appropriate item and selecting *edit*. The purchaser will then change the necessary information.

If the purchaser chooses to delete an item, he/she will select the checkbox next to the appropriate item and select *delete*.

Once the purchaser has changed the necessary information, he/she may select *Checkout*, verify the order information and select *Submit*. The order will again be sent out for approval. The first change to an order will result in the suffix “V-2” (Version 2) being added to the order number. The next change to the same order will be reflected by adding V-3 to the original order number.

Note: If the order is changed more than three times, the initiator will no longer see the order in his/her Composing file, and a new order must be created.

The purchaser should also immediately contact the vendor by phone to confirm the changes to the order.

**Order Cancellation:** If a purchaser wishes to cancel an order after entering the order in eVA, he/she should log-in to eVA and select eMail/eForms. In the *My Documents* window, select the PR number of the order to be canceled. Select *Cancel* as displayed below:
The purchaser may add comments to the order and select OK. The canceled order will remain in the purchaser's My Documents window and will have a new version number applied to the order.

The purchaser should also immediately contact the vendor by phone to confirm that he/she wishes to cancel the order and to verify that the vendor has received notification of the cancelled order in eVA.

**Order Returns:** If a purchaser wishes to return items after an order is received, he/she should contact the vendor to determine the process for the return. The vendor will provide instructions on the proper procedure for returning the items. If a purchaser is unsuccessful in negotiating a return with a vendor, he/she may contact the Purchasing Office at 3-2580.

After the merchandise has been returned, the purchaser should follow up to ensure that a credit has been issued by the vendor to the appropriate P-Card account, a correct invoice received or a refund check processed. A change order should be processed in eVA following the guidelines above.

Please refer to the [Change Order](#) guide or [Order Receiving](#) guide for additional assistance.

**Payment and Receiving**

**P-Card Orders:** The P-Card is the preferred payment method for the purchase of goods and services costing less than $2,000. P-Card charges are billed monthly. The billing cycle runs from the 16th of one month to the 15th of the following month. The cardholder will be responsible for utilizing the Bank of America Works website to accurately allocate P-Card transactions before the stated deadline. Instructions for completing the Bank of America Works process may be accessed by visiting the [Electronic P-Card Process](#) webpage.

Purchasers using the P-Card may split charges between various funds and orgs; however, the P-Cardholder or the P-Card approver must have signature authority for each fund/org charged. All receipts, including copies of eVA orders, must be retained and used to complete the fund/org reconciliation. Instructions for completing the monthly reconciliation may be found at [Process P-Card Monthly Reconciliation](#). P-Card records are subject to audit and should be maintained for a period of three years for all fund/org transaction and ten years if grant funds were used.

P-Card purchases are NOT approved in eVA or received in eVA by the unit approver. The P-Cardholder will have to approve any Confirming Order before an order number (PCO/EP) is issued. The
EP/PCO number must be entered into Bank of America Works during the P-Card reconciliation. The P-Card User Guide may be accessed from the Fiscal Services website at [Cardholder Manual](#).

**Direct Orders:** If a purchaser does not have a P-Card or a vendor does not accept the P-Card, the vendor will invoice the University. When the items are received the purchaser must acknowledge delivery. For orders totaling $2,000 or more, Accounts Payable will send an email to the purchaser asking if the item(s) were received by the department or unit. Response to this email will serve as receipt of these items. If the purchase is under $2,000 the items may be received electronically in eVA by following the instructions below.

1. Log in to eVA within 24 hours of receipt and select eMall/eForms.
2. Locate the order in the My Documents window.
3. Select the PR # to open the documents then select the Receive button above the document title.

   ![Image of eVA interface](image)

   1. If all of the items were received, select the Accept All button and then “Yes” in the Close Order field at the bottom. Then select Submit.
   2. If a partial order has been received, select the items and quantities received, select Accept and then select Submit. If all items have not been received, do not select “Yes” in the Close Order field.
*Please Note: If the department receives an invoice from the vendor, the invoice should immediately be sent to Accounts Payable, MSN 3C1 or acctpay@gmu.edu. The department must note the EP # on the invoice. Invoices for dues and other items may be electronically attached to an eVA order, but the invoice must also be sent to Accounts Payable, MSN 3C1 or acctpay@gmu.edu. Accounts Payable requests email certification of receipt or approval of payment from eVA users in the following situations.

Request for receipt confirmation: When an invoice is received in Accounts Payable for an EP purchase order that is $2,000 or greater, Accounts Payable staff will email the eVA order initiator to confirm that the goods or services have been received or provided. This email certification of receipt is required since the eVA electronic receiving process is not available for orders over $2,000.

Request for invoice approval: When an invoice related to an eVA EP blanket purchase order or encumbrance is received, Accounts Payable staff will email the department/unit representative for invoice approval.

A response is required within two business days. If you have any questions, please contact the Accounts Payable department at 3-2580 or email to acctpay@gmu.edu.

When the amount of the invoice(s) paid is less than the related eVA purchase order, an encumbrance for the difference sometimes remains in Banner Finance. These amounts will be rolled forward into subsequent fiscal periods until manually deleted. To avoid trailing encumbrance issues, please write “final payment” on the final invoice related to the eVA order that is paid. To close out an encumbrance, email enclose@gmu.edu.

A second receiving process is available for invoices related to purchase orders of $2,000 or less. When Accounts Payable receives an invoice and notes that items/services have not been received in eVA, the Accounts Payable staff will send an email to the eVA order initiator indicating that the invoice, which has been received, is attached and will be processed for payment in five business days subject to prompt pay regulations or contract provisions. (Accounts Payable will notify an alternate approver when an out of office email indicating the order initiator is out of the office beyond the five-day period is received.) The order initiator or receiver must immediately (in fewer than five business days) respond by...
selecting “reply all” to the Accounts Payable email if the invoice should NOT be paid. If the goods/services have been received and the invoice is correct, no response from the order initiator is required. **The requirement for the receiver to retain documentation in the department (electronically or otherwise) that the goods or services have been received remains unchanged and is essential to satisfy audit requirements.** Record retention requirements are three years for all Mason funds or orgs; ten years for grant or sponsored funds.

**Receiving Tip:** When processing non-P-Card payments for items such as subscriptions, professional membership dues and service contracts, the purchaser should “receive” these items in eVA as soon as the order is approved and immediately send the vendor invoice with the EP# noted to Accounts Payable. The Accounts Payable department pays vendors 30 days after receipt of the invoice and goods or services. Receiving these types of orders in eVA, even before the first subscription issue has arrived, for example, will ensure that the payment process begins, and the vendor will be paid in a timely manner.

## Contracts and Specialized Procurement

### Mandatory Source

The Code of Virginia requires that certain goods and services be procured from designated state agencies and non-profit vendors. These vendors are registered in eVA.

### Office Supplies

The Supply Room Companies is the mandatory vendor for office supplies. Prices for the most commonly ordered items are generally favorable because of a State contract. GMU Logo items and multi-part forms are also available by searching “GMU” in the Supply Room PunchOut catalog. Users must be sure to select the “GMU – The Supply Room Companies” PunchOut catalog.

### Furniture

Department representatives may issue an eVA purchase order to VCE for furniture purchases less than $2,000. Departments may not purchase furniture from any other source. If furniture from a vendor other than VCE is requested, a VCE Release Request, sometimes referred to as a waiver, is required. The request form may be found here: [VCE Release Request](#). The approved VCE Release Request and a Purchase Requisition should be submitted to the Purchasing Office for processing at any dollar amount.

### Business Cards

George Mason University business cards should be purchased using a P-Card online at [Business Cards](#). The Mason Purchasing Office has issued a blanket eVA order to Worth Higgins, the business card vendor, therefore no eVA order is required.

### State Contracts

Term contracts are established by the Department of General Services/Division of Purchases and Supply to obtain more favorable prices through volume purchasing, to reduce procurement lead-time and minimize administrative effort. If an item is available on a State contract, the State contract is the recommended first source for the purchase. Departments may obtain copies of State contracts from the Purchasing Office, or from the Department of General Services, Division of Purchases and Supply web
site at http://www.dgs.state.va.us/. Under certain circumstances, the Purchasing Office may authorize purchasing from another source.

Other Contracts (Non-Mandatory)

The Purchasing Office has secured contracts with various vendors for University procurement. These contracts may be accessed by visiting the Search for Existing Contract webpage. Additionally the University has access to the Virginia Association of State Colleges and University Purchasing Professionals (VASCUPP) contracts and may use these vendors for purchases. To search VASCUPP contracts please visit their website at https://vascupp.org/contracts.php.

Specialized Procurement

Catering

Catering services are not exempt from eVA. An approved eVA order is required for all catering services. A list of approved caterers may be found at Approved Caterers. For specific instructions on processing catering orders please visit the Specialized Procurement webpage and click on “Catering.” Users may also access the Food and Beverage Expenditures manual.

On Campus Vendors

Transactions conducted with Patriot Tech, the Bookstore and Sodexo are not required to be processed through eVA. Please see the guidelines below for individual vendor instructions.

- **Patriot Tech**: Accepts an authorized Patriot Computers Purchase Authorization form for any purchase less than $30,000. The form is available at Patriot Computers Purchase Authorization Form. Patriot Tech Does not accept P-Card payments.
- **Mason Bookstore (Barnes & Noble)**: Accepts the P-Card for over-the-counter purchases under $2,000. Also accepts an authorized Mason Bookstore Charge form. The form is available at Mason Bookstore Charge Form.
- **Sodexo Catering**: Sodexo has an online ordering system to assist faculty and staff who process catering orders. Users may access the Mason Catering website to initiate catering orders and simplify the catering process. Sodexo will bill the department after providing services.

Detailed information on all of these purchase types may be found in the Purchasing Made Easy manual, located at Purchasing Made Easy Manual.
## Contact Information

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<td>Accounts Payable</td>
<td>3-2580, <a href="mailto:acctpay@gmu.edu">acctpay@gmu.edu</a></td>
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<tr>
<td>Purchases over $2,000</td>
<td>Purchasing Office</td>
<td>3-2580, <a href="mailto:purch1@gmu.edu">purch1@gmu.edu</a></td>
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<td>eVA process questions</td>
<td>Purchasing, eVA Support</td>
<td>3-2580, <a href="mailto:evaadmin@gmu.edu">evaadmin@gmu.edu</a></td>
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<td>P-Card process questions</td>
<td>Purchasing, P-Card Office</td>
<td>3-2580, <a href="mailto:pcardadm@gmu.edu">pcardadm@gmu.edu</a></td>
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<td>P-Card applications</td>
<td>Purchasing, P-Card Office</td>
<td>3-2580, <a href="mailto:pcardadm@gmu.edu">pcardadm@gmu.edu</a></td>
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<td>P-Card Bank of America Works</td>
<td>Purchasing, P-Card Office</td>
<td>3-2580, <a href="mailto:pcardadm@gmu.edu">pcardadm@gmu.edu</a></td>
</tr>
<tr>
<td>eVA access and user updates</td>
<td>Finance Administrative Systems Team (FAST)</td>
<td>3-2574, <a href="mailto:fast@gmu.edu">fast@gmu.edu</a></td>
</tr>
<tr>
<td>Fiscal policies</td>
<td>Fiscal Services Training Manager</td>
<td>3-5966, <a href="mailto:jadams15@gmu.edu">jadams15@gmu.edu</a></td>
</tr>
<tr>
<td>Advanced technical eVA support</td>
<td>eVA Customer Care Support</td>
<td>800-289-7367, <a href="mailto:evacustomercare@dgs.virginia.gov">evacustomercare@dgs.virginia.gov</a></td>
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### Quick Guides

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Appendix A

Purchase of Goods and Services

University Policy Number 2106

Categorized: Financial

Responsible Office: Purchasing

Policy Procedure:

- Detailed procedures are available in Purchasing Made Easy and Basic eVA Purchasing on the Fiscal Services web site at: http://fiscal.gmu.edu.

Related Law & Policy:

- Policy 2101: Travel Authorization and Reimbursement
- Policy 2102: Food and Beverage Expenditures
- Policy 1124: University Owned Cellular Equipment

I. SCOPE

This policy applies to all George Mason University faculty, staff, and students including all University locations, owned and leased.

II. POLICY STATEMENT

As an Agency of the Commonwealth of Virginia, George Mason University has a public obligation to perform its procurement in accordance with the intent of the laws of the Commonwealth. The intent of the Virginia General Assembly is set forth in the Rules Governing Procurement of Goods, Services, Insurance and Construction, (Code of Virginia, §23-38.90, Chapters 824 & 829). Elements of intent include: that Agencies obtain high quality goods and services at a reasonable cost; that competition be sought to the maximum extent possible; that all qualified vendors have access to public business; and that procurement procedures be conducted in a fair and impartial manner. It is further the intent of the Virginia General Assembly that the provisions of the Governing Rules apply in all cases where there is to be a contract between a governmental body and a nongovernmental body, regardless of the source of funds by which the contract is to be paid or in the absence of any monetary consideration flowing to either party.

The Board of Visitors of George Mason University amended its Bylaws on December 7, 2005, to add specific guidance regarding all contractual agreements entered into by any Official of the University. Specific signature authority is vested in the President and the Senior Vice President. Further delegation of this authority to contractually obligate the University must be provided in writing.

It is the policy of the University to contribute to the establishment, preservation and strengthening of small businesses and businesses owned by women and minorities and to encourage their participation in procurement
activities. The University encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnership, joint ventures, subcontracts, or other contractual opportunities.

The University is committed to the stewardship of the environment and to reducing the University’s dependence on non-renewable energy.

III. RESPONSIBILITIES

A. Purchasing Goods and Services

Goods and services that cost less than $2,000 may be purchased by individuals with account responsibility and their designees. Mandatory contracts for purchasing all furniture, janitorial supplies, rubber gloves, and office supplies must be honored. Pre-approval requirements must be met for travel expenditures, food and beverages expenditures, temporary employment services, cellular telephones, copying, and printing. The Purchasing Department is responsible for purchasing and leasing all goods and services for the University that cost $2,000 or more, except: 1) those associated with the Capital Outlay process and 2) real estate rentals and leases. Capital Outlay procurement is the responsibility of Facilities Planning (construction/architectural). University Counsel has the sole responsibility to negotiate real estate rentals and leases and any changes to existing rentals and leases.

B. Contract Administration

A Contract Administrator will be designated to monitor and support contracts for delivery of goods and services which occur over an extended time period. The contract administration process delegates authority, which allows for direct communications between the representative of the University receiving the goods/services and the vendor, with the aim of facilitating and verifying desired performance standards. Active contract administration and written, annual evaluation of vendor performance are the cornerstones of effective outsourcing. Contract Administrators are restricted from making any commitment or conducting any negotiations which change the scope of the contract or may result in modified financial expenditure. Members of the Purchasing Department are available to consult with Contract Administrators on any matter, and must become involved to issue written change orders and renewals, and to formally address performance shortcomings, non-renewals and contract terminations.

IV. COMPLIANCE

Failure to comply with this policy may result in revocation of delegated purchasing authority by the Director of Purchasing.

All persons engaged in purchasing activity equal to and greater than $2,000 will have a letter providing specific levels of authority. In the absence of such written authorization, University faculty, staff, and students are not permitted to sign contracts or make obligations on behalf of the University to a private vendor. Such actions taken without proper authority will be considered taken at personal financial risk.

V. EFFECTIVE DATE AND APPROVAL

July 2017
Appendix A

The policies herein are effective July 1, 1999. This Administrative Policy shall be reviewed and revised, if necessary, annually to become effective at the beginning of the University’s fiscal year, unless otherwise noted.

Approved:

_/S_ _______________________
Maurice W. Scherrens
Senior Vice President

_/S_ _______________________
Peter N. Stearns
Provost

Date approved: May 20, 2004
Revised: January 14, 2010
Revised: February 3, 2012