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

Prepared by the Fiscal Services Training Department

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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 more than $5,000. The $5,000 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 of $5,000 or less to certain employees at the department level. Purchaser with the $5,000 or less 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

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. 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 of $5,000 or less. 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”.

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 PatriotWeb).
User Preferences

To change user preferences, log into eVA and select the Preferences from the top right once logged in. 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 $5,000 or less. 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 coordinate with the vendor on the best avenue for order submission.
## 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 <em>other than</em> 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 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>
<tr>
<td><strong>Purchase Card Order (PCO#)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Purchase Order (PO) Category</strong></td>
<td>This is a reference to the type of eVA order. The PO category is <strong>R01</strong> for all routine purchases. If the purchase is (as noted below) exempt from the fees associated with eVA, the PO category is <strong>X02</strong>.</td>
</tr>
</tbody>
</table>
**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.

**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). Additional information may also be found in the Purchasing Made Easy manual, located at Purchasing Made Easy Manual. An eVA Exemption Guide 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 places on the vendor’s website or by telephone.
4. Reimbursements (limited, see Reimbursement Guidelines)
5. Honorarium payments under $2,000 (total).
7. Postage (this includes mailing services such as FedEx and UPS).
8. Business Cards - may be purchased on-campus through Canon Solutions or online through Worth Higgins using the Mason P-Card. See Printing Contracts Quick Guide.
9. Sodexo Catering – should be ordered through the online Catertrax application. Sodexo provides Mason’s on-campus dining and is the preferred caterer.

10. Interdepartmental (Recharge process)

The items listed below are exempt from eVA fees and must reference the PO category “X02” (see above for PO category definition) This way eVA will not charge Mason a transaction fee for the purchase.: 

1. Professional organization membership dues.
2. Entertainment payments to: speakers, lecturers, musicians and performing artists. This 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 utility payments (electric, natural gas, water sewer).
10. State Agency to State Agency payments.

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 Micro/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 Vendor List under the Transparency heading.
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.

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 Knowledge Center from the eVA Dashboard menu. Then, click on the Supplier Info tab to view the Registered Vendors and/or SWaM and DBE Directory.
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 eVA Customer Care Team is available at 1-866-289-7367 to assist vendors with the self-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 e-Mall 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 $5,000 must be processed through the Purchasing Office. The $5,000 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 $5,200 that is placed in two parts: a $2,500 order for the conference table that is followed by a $2,700 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.

![Image of P-Card Information form]

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.

**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, with the EP number (purchase order) noted, must be sent to Accounts Payable at acctpay@gmu.edu in order to be processed and paid.
Shipping and Delivery Charges

If an eVA order includes a charge for shipping/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 more than $5,000), 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 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 begins 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. 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**.

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.
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 (Org) 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 (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

Step-by-step instruction on processing a PunchOut catalog order are available on the PunchOut Catalog Quick Reference Guide.

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](#).

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:
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 *Resources* section found at the top 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 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—

![Shopping Cart Screen with two copies of Vinyl Gloves](image)

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.

![Shopping Cart Screen with checked item](image)

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 PO Category (R01, X02, PCO# or “exempt”) 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

Step-by-step instructions are available on the Non-Catalog Quick Reference Guide.

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 Users should not attach Social Security numbers or COV substitute W-9/W-8 BEN forms to an eVA order.

Go to: http://eva.virginia.gov. Select eVA Vendors List (under the Transparency heading) 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/register-now.html). Once vendor registration is complete, the vendor should submit the COV 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 COV 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.

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

Orders 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. 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.

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

When placing orders over $5,000, 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 order please review the eVA Quick Reference Guide.

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. Occasionally, 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 **COV substitute W-9/W-8 BEN** to papadmin@gmu.edu so that the Purchasing Office can create a G# for the vendor.

- **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 by the purchaser’s supervisor or designated approver 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.

**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 eMall/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 eMall/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 $5,000 or less. 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 divide charges between multiple 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 PO Category (R01, EX02) or the PCO number, or “exempt” must be entered into Bank of America Works GL04 field 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 more than $5,000, 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 $5,000 or less 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.
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 more than $5,000, 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 $5,000.

**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 $5,000 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**

Mason has established mandatory contracts for certain procurement categories. A mandatory vendor must be used when purchasing the goods described below.

**Business Cards**


**Embroidery Services**

The Purchasing Department has established several contracts with vendors to provide embroidery services. For embroidery printing, users should contact the vendor(s), referencing the corresponding contract number, to determine job pricing and then complete the steps to purchase. Procedures are available at [https://fiscal.gmu.edu/wp-content/uploads/2018/11/Embroidery-Contracts.pdf](https://fiscal.gmu.edu/wp-content/uploads/2018/11/Embroidery-Contracts.pdf).

**Furniture**

Prior to purchasing any furniture, the department is required to contact Campus Planning for review and approval of the purchase. Campus Planning must assess furniture purchases to ensure adherence with University Design Standards, to ensure interchangeability, and to ensure orders are processed with VCE in order of urgency. Please email Debbie Brady at dbrady3@gmu.edu for review and approval of your furniture order prior to submitting an eVA requisition.

Department representatives must issue an eVA purchase order to Virginia Correctional Enterprises (VCE) for all furniture purchases. Departments may not purchase furniture from any other source. If furniture from a vendor other than VCE is required, a VCE Release Request, or waiver, must be submitted and approved prior to purchase. The approved VCE Release Request and an eVA order should be submitted
to the Purchasing Department for all furniture purchases at any dollar amount, including those less than $5,000. *Sit-stand desk purchases do not require a waiver. Ordering information is available at https://fiscal.gmu.edu/knowledge-base/sit-stand-desks/.*

**Office Supplies**

The Supply Room Companies is the mandatory vendor for office supplies. Supplies routinely used in offices and classrooms at Mason are considered office supplies. These items may only be purchased from the Supply Room Companies (TSRC). There is a Mason PunchOut catalog available in eVA for quick ordering.

Examples include:

- Batteries (AAA, AA, C, D and 9Volt used in office and classroom equipment)
- Binders and dividers
- Calendars
- Desk organizers and baskets
- Envelopes and stationary
- Erasers, correction fluid and correction tape
- Folders such as file, pocket, hanging and portfolio
- Index cards
- Labels and label makers
- Paper fasteners such as paper clips, binder clips, staples and staplers
- Paper products such as post-it notes, pads of paper, legal pads and steno pads
- Pencil sharpeners
- Printer cartridges and toner
- Tape and tape dispensers
- Writing instruments such as chalk, markers, highlighters, pens and pencils

To purchase an office supply item not stocked by The Supply Room Companies from a vendor other than The Supply Room Companies, except in an emergency situation, complete and submit the [Office Supply Waiver](https://fiscal.gmu.edu/knowledge-base/sit-stand-desks/) to the Purchasing Department for review and approval prior to purchase. The Office Supply Waiver may be found on the [Forms and Instruction](https://fiscal.gmu.edu/) page of the Fiscal Services website.

**Printing Services**

The Purchasing Department has established several contracts with vendors to provide printing service. For printing services, users should contact the vendor(s), referencing the corresponding contract number, to determine job pricing and then complete the steps to purchase. Procedures are available at [https://fiscal.gmu.edu/wp-content/uploads/2018/11/Printing-Contracts.pdf](https://fiscal.gmu.edu/wp-content/uploads/2018/11/Printing-Contracts.pdf)

**Promotional Items**

The Purchasing Department has established several contracts with vendors to provide promotional items. These vendors have been approved to use the Mason logo and provide competitive contract pricing for many items. For promotional items, users should contact the vendor(s), referencing the corresponding contract number, to determine job pricing and then complete the steps to purchase. Procedures are available at [https://fiscal.gmu.edu/purchasing-promotional-items/](https://fiscal.gmu.edu/purchasing-promotional-items/).

**T-Shirt Screen Printing**
The Purchasing Department has established several contracts with vendors to provide t-shirts/screen printing. These vendors have been approved to use the Mason logo and provide competitive contract pricing. For T-Shirt screen printing, users should contact the vendor(s), referencing the corresponding contract number, to determine job pricing and then complete the steps to purchase. Procedures are available at https://fiscal.gmu.edu/wp-content/uploads/2017/07/TShirt-ordering-procedures.pdf.

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

In addition to the procedures for Mandatory vendors, there are several types of specialized purchases that require additional action by the department. A description of these services and corresponding procedures are listed below. For a complete list, please review the Purchasing Made Easy guide.

Administrative Systems/Applications

Please note that the procurement of administrative systems/applications (including software, systems, applications and some online/electronic databases) must be reviewed and approved by the Architecture Standards Review Board (ASRB) in advance of purchase. The Purchasing Department will not approve any purchase of administrative systems/applications without evidence of ASRB approval attached to the purchase request in eVA. Administrative systems/applications are defined as software, hardware or hosted services provided by a vendor or developed internally that are used to store regulated data. The forms and instructions are available at http://ascreview.gmu.edu/.

Mason Bookstore

The Mason Bookstore (Barnes & Noble) is authorized to accept the P-Card for departmental purchases of allowable items costing $5,000 or less. The university encourages the use of a P-Card whenever possible. Over the counter purchases made with a P-Card should be noted as “exempt” in the “eVA Order or exempt” allocation box in Bank of America Works. Please note that all mandatory contracts and policies apply. Gift cards may not be purchased through the Mason Bookstore.

Computer Equipment and Software

All computer equipment and software, except for Site Licensed Software, will be procured in accordance with the purchasing guidelines described above. For Site Licensed software, departments should inquire with ITS by email to support@gmu.edu. A listing of IT Software downloads is available at https://itservices.gmu.edu/downloads/index.cfm. Additional information related to computer equipment purchases may be found on the Computer Purchase Guide.

Prior to the purchase of any new software, system or application, that will reside on Mason equipment (servers, computers, electronic devices, etc.) or interact with any other Mason systems or software, regardless of dollar value, the department must alert the Mason Architectural Standards Review Board (ASRB). The ASRB will advise the department if the software/system/application will require an ASRB
review or other Information Technology Service (ITS) review. Users may email asrb@gmu.edu to
determine if the system/software requires this review prior to purchase. If a review is required, you
must attach your ASRB approval to the purchase requisition in eVA prior an order being placed.

The Internal Revenue Service (IRS) regulations state that payments to foreign vendors for software and
licensing fees are considered royalty income and are taxed at the 30% statutory rate, unless the reduced
rate applies. Please contact the International Tax Office prior to purchasing software/licensing from
foreign vendors.

Food and Beverage

Commonwealth of Virginia rules generally prohibit the use of state funds to purchase food and
beverages for employees. Mason has a public obligation to ensure that all expenditures are essential
and reasonable and in support of the university mission. As such, state rules prohibit the use of state
funds for employee personal expenses, including meals, snacks and refreshments. Please visit,
University Policy 2102, Food and Beverage Expenditures, to review the policy for all George Mason
University employees, students, organizations and individuals.

A separate manual on Food and Beverages Expenditures is available on Fiscal Services website as well as
a Food and Beverage Overview. Training sessions are available periodically to present information
related to the procedures for purchasing food and beverages. Upcoming sessions are listed at
workshops.gmu.edu. Questions regarding these expenditures should be addressed to Accounts Payable
at ext. 3-2580.

Patriot Tech Purchases

Patriot Tech (eVA #VS0000038907, Barnes & Noble Booksellers, Inc.) is a registered vendor but does not
offer a PunchOut Catalog in eVA. Orders to Patriot Tech may be processed in eVA as a Non-catalog order
with a P-Card or a Non-P-Card order. If you are entering an eVA order you must obtain a quote from the
Patriot Tech store (you can mail, call or visit in person to obtain a quote) and attach the quote, marked
“visible to supplier”, to the Purchase Requisition (PR) in eVA. You must also include the Barnes and
Noble contract ID (GMU-1115-14) in the “Contract Number” field when creating your eVA requisition.
Click here for more information on submitting an eVA order. Individuals may provide a printed eVA
purchase order (EP#) to Patriot Tech and pick up in stock items on-site.

Patriot Tech will accept the Mason P-Card on-site in the Johnson Center and is a supplier of Dell
(Optiplex and Latitude) and Apple desktops/laptops. Over-the-counter purchases made on-site at Patriot
Tech and paid with a Mason P-Card are exempt from eVA entry. See the Computer Purchase Guide for
procedures.

Professional Services

These services are specifically defined in Virginia law as the practice of accounting, actuarial services,
arquitecture, land surveying, landscape architecture, law, medicine, dentistry, optometry, pharmacy,
and professional engineering. The procurement of professional services requires competitive
negotiation. Concurrence and/or approval from other State agencies may be required. Please contact
the Purchasing Department for assistance regarding the procurement of professional services.
# Contact Information

<table>
<thead>
<tr>
<th>Type of Assistance</th>
<th>Department</th>
<th>Phone/Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor invoices</td>
<td>Accounts Payable</td>
<td>3-2580, <a href="mailto:acctpay@gmu.edu">acctpay@gmu.edu</a></td>
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<tr>
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<td>Purchasing Office</td>
<td>3-2580, <a href="mailto:purch1@gmu.edu">purch1@gmu.edu</a></td>
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<tr>
<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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<tr>
<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>
</tr>
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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 Communications Team</td>
<td>3-5966, <a href="mailto:fscomm@gmu.edu">fscomm@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>
</tr>
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## eVA User Step-by-Step Quick Guides

Appendix A

Purchase of Goods and Services

University Policy Number 2106

Categorized: Financial

Responsible Office: Fiscal Services, Purchasing


I. Scope

This policy applies to all George Mason University faculty, staff, and students.

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 by a Public Institution of Higher Education of the Commonwealth of Virginia,” §3.0 of the second enactment clause of Chapters 824 and 829 of the 2008 Acts of Assembly of Virginia. 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 has vested specific signature authority in the 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.

III. Responsibilities

A. Purchasing Goods and Services
Appendix A

Goods and services that cost $5,000 or less may be purchased by individuals with account responsibility and their designees. Mandatory contracts for purchasing all furniture, office supplies, and others, as designated by the Purchasing Department, must be honored at all dollar amounts. In addition, all staff will assist in the standardization of purchases for commonly procured goods and services by utilizing institution-wide contracts, where available. The Purchasing Department is responsible for purchasing and leasing all goods and services for the University that cost more than $5,000, 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). Auxiliary Services 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 Chief Purchasing Officer.

All persons engaged in purchasing activity greater than $5,000 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. Dates

A. Effective Date:

This policy is effective July 1, 1999. This Administrative Policy shall be reviewed and revised, if necessary, annually to become effective September 1, unless otherwise noted.

B. Date of Most Recent Review:


VI. Timetable for Review

April 2020
Appendix A

This policy, and any related procedures, shall be reviewed every three years or more frequently as needed.

VII. Signatures

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.