

# eVA Exemption Guide

Most goods and services must be purchased utilizing eVA, Virginia's electronic procurement system, however, some exceptions are allowed. 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.

## 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 the vendor's website or by telephone.
4. Reimbursements (limited, see [Reimbursement Guidelines](#)).
5. Honorarium payments (see, [Honorarium Payment Guidelines](#)).
6. Payments to the Department of Homeland Security.
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, [Business Card Guidelines](#)).
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 charges (See, [Recharge process](#)).

## Routine Purchases (R01)

The items listed below are examples of items that are subject to eVA fees (charged to Mason). These are items that may be purchased in eVA or directly with a vendor using a P-Card and must be classified as an "R01" in eVA and/or during the Bank of America allocation process.

1. Food purchases placed on the phone or online.
2. Purchases made for supplies, etc. over the phone through an online portal (i.e. Purchases made on Amazon)
3. Purchases for T-shirts, promotional items, software, lab supplies
4. Tangible items not otherwise classified.
5. Subscriptions (periodicals, services, software, etc. for bona fide business purposes, NOT TO EXCEED ONE YEAR)

## Purchases exempt from eVA fees (X02)

The items listed below are exempt from eVA fees (charged to Mason). These are items that may be purchased in eVA or directly with a vendor using a P-Card, however, the PO Category field should be changed to "X02" (instead of R01) in eVA and/or during the Bank of America allocation process. 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. Accreditation fees and academic testing services.
4. Advertisements in newspapers, magazines, journals, radio or television.
5. Real estate leases.
6. Exhibition rental fees for exhibitions of historical artifacts or works of art.
7. Public utility payments (electric, natural gas, water sewer).
8. Purchases from public auction (non-electronic).
9. State Agency to State Agency payments.

# Create a Catalog Order in eVA

A Punchout Catalog is a vendors' goods or services catalog that is embedded in eVA. It allows purchasers to "punchout" items from a vendor's on-line catalog that integrates with the eVA platform. Selected items and the vendor information is used to create a purchase requisition automatically in the eVA format.

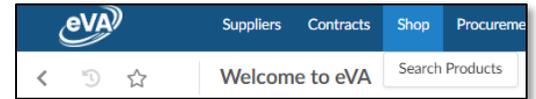
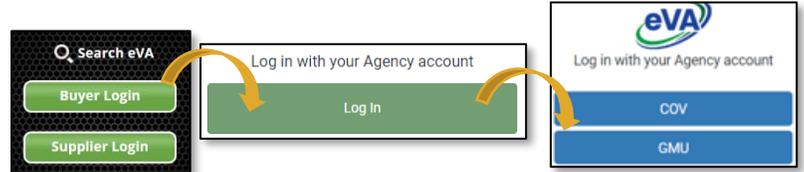
## Verify the Vendor

1. Access the eVA Vendor List and perform a search. Verify that the vendor is listed as "active" and review their ability to accept electronic orders and/or P-Card payments. (See the *Doing Business with Mason* section of the eVA Manual for additional guidance)
2. Access the Mason Vendor G# Lookup and perform a search. Verify that the vendor is listed. If the vendor is not listed, direct them to the *Doing Business with Mason* webpage to submit their W-9/W-8 through the Mason vendor portal. A G# is required before payment can be issued. (See the *Doing Business with Mason* section of the eVA Manual for additional guidance)



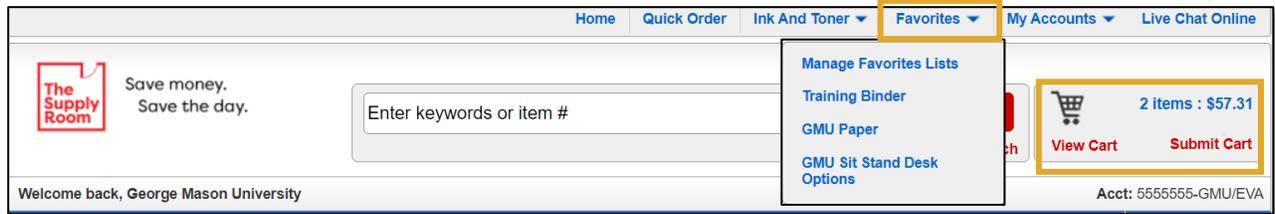
## Create the Requisition

1. Go to <https://eva.virginia.gov/> and select **Buyer Login**. Then **Login with your Agency account** and select **GMU**. This will bring you to the Mason single sign on/2FA.
2. On the homepage select **Shop** from the menu bar and then click on **Search Products**.
3. Open the Filter panel from the left side of the screen. We recommend you "pin" the panel to this page. Check the box next to "Punchout Only" and then type in the name of the Supplier whose punchout Catalog you would like to view in the "Search Products" field.
4. Click on the Cart icon next to the correct supplier to view their Catalog and place an order.



Order	Image	Commodity	Product Code	Supplier	PR/Order items Label	Detailed Description
		OFFICE SUPPLIES, GENERAL		The Supply Room Companies	The Supply Room Companies GMU Punchout	The Supply Room Companies GMU Punchout (GMU) Office, Tech Supply & Furniture - S, W
		OFFICE SUPPLIES, GENERAL		TSRC - VSU	The Supply Room Companies VSU Punchout	The Supply Room Companies VSU Punchout (VSU) Office, Tech Supplies & Furniture - S, W

- The suppliers Punchout Catalog will open. You can browse products and add them to your cart within the Catalog. *Note: The Supply Room Catalog has created GMU specific lists under Favorites for easy ordering.*



- After all products have been added to the Catalog cart, click the “Submit Cart” or “Checkout” button (depending on the vendors terminology) to return to eVA and complete the Catalog Order.

- In the **Header** section, enter the required information as follows:

- Name:** Title for the purchase (example, “TSRC Order 10/15 M19678”).
- Organization:** Do not change. Will default as assigned.
- Type:** Will default to *Purchase*
- PO Category:** Select “RO1” for routine purchases or “XO2” for specific purchases exempt from fees. (See, eVA Exemptions Guide)
- Requester:** Will default to user.
- Reference Number:** Optional field.
- Procurement Transaction Type:** Select as appropriate. (See, eVA Manual)
- Header Field 1, Header Field 2:** Optional fields.
- DO NOT check the box for **Create Blanket Purchase Order** or **Bypass Integration**.

The screenshot shows the 'Header' form in the eVA system. Fields include: Name (Req. 11/3/2022), Organization (A247-402 Fiscal Services), Type (Purchase), PO Category, Requester (Strange Heather), Reference Number, Procurement Transaction Type, Header Field 1, Header Field 2, Status (Draft), and buttons for 'Workflow Preview & Ad hoc', 'Create Blanket Purchase Order', and 'Bypass Integration?'. The 'Create Blanket Purchase Order' and 'Bypass Integration?' checkboxes are unchecked.

- In the *Items & Services* section, verify the products and quantities are correct.

- To add an **Allocation to the entire purchase order**, select all items and then click “Set Allocation.”

The screenshot shows the 'Items & Services' table. At the top, there are buttons for '+ Add line', 'Copy Selected Lines', 'Delete Lines', 'Edit Lines', and 'Set Allocations'. The table has columns for Item #, Product Type, Supplier Part #, Item Description, and Supplier. Two items are listed, both with checkmarks in the first column.

Item #	Product Type	Supplier Part #	Item Description	Supplier
1	Product	SWI74736	Swingline 747 Rio Red Stapler - 25 of 20lb P...	(The Supply Room
2	Product	AVE05711	Averyreg; Economy View Binder - 1' Binder ...	(The Supply Room

- Enter “100” in the % field, select “2023” as the Fiscal Year, select the Fund or Org, and Account code. Then click **Apply and Close**. The allocation will be

recorded for all lines. To split the allocation, click the **+Allocation** button and repeat the steps.

The screenshot shows the 'Allocation' form. Fields include: % (100), Fiscal year (2023 - eVA-Wide Legal), Organization Allocation (M19367 - Employee Relations), Fund, Activity, Account (74120 - Office Supplies), Acc. Cross Reference, and Organization (A247-402 Fiscal Services). A '+ Allocation' button is highlighted in the top left.

- To add an **Allocation to each line item**, click the pencil icon next to the item to open the **Item Details**. Scroll down to the Allocation section. Select “2023” as the Fiscal Year, select the Fund or Org, and Account code. To split the allocation, click the **+Allocation** button and repeat the steps. Then click **Save and Close**.

12. To use the P-Card for the order, click the card icon on the left side of the REQ. Choose the P-Card and then **Save**. The P-Card does not automatically default as the payment method.

13. In the *Attachments* section add the required documents, such as the vendor quote, contract, or other supplemental material. Click the **+** **New Document** button and select **Internal Attachment** – this will only be visible to Mason OR **Supplier Document** – this will be visible to the supplier and Mason.

14. In the Document window, enter a Title for the Documentation and optional Summary. Then **Click or Drag** to add files.

15. Click **Save** to add the file. Continue to add Files for the selection or click **Close** to exit the Document window.

16. The file will now be listed as an attachment on the Purchase Req. (REQ)

17. In the *Internal Comments* section, add any additional information for the REQ Approvers and/or the Mason Purchasing Office Buyer. This information will only be visible to Mason and the Supplier will not see this section.

18. To add a Comment visible to the Supplier, scroll to the top of the REQ and click into the *Comment* field. Located beneath the *Ship to/Bill to* section. Enter relevant comments for the Supplier. These comments will also be visible to Mason. Click **Save**.

19. When all information is complete click **Submit for Approval**.

20. The system may alert you to “non-blocking” alerts. These alerts do not stop you from submitting the order. Users must resolve any “blocking” alerts in order to complete the submission. Follow the instructions presenting the Alerts/Messages section to resolve “blocking” alerts.

21. Users may check the status of REQs by viewing the **What’s my order status?** section on the eVA Homepage.