

UCR



eBuy/Accounts Payable Users Group Meeting

(July 18, 2018)

Alumni & Visitor's Center

BFS – Business & Financial Services

A Division of Business & Administration Services (BAS)



UNIVERSITY OF CALIFORNIA, RIVERSIDE



Agenda

- Staff Updates
- Accounts Payable
 - Launching a new invoice processing platform
(Transcepta – 3rd Party processing partner)
- eBuy/Procurement Services
 - Low Value Purchase Authorizations (LVPA) Threshold Increase
 - What are Unauthorized Purchases?
 - eBuy/eCatalog Content Management Initiatives
 - New Review and Approval Procedures:
 - Information Technology Solutions (ITS)
 - Environmental Health & Safety (EH&S)
- Uniform Guidance Requirements
- Q&A



Staff Updates



Accounts Payable

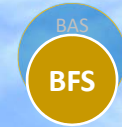
- Vendor Maintenance
Valerie Davis (internal move)
- Accounting Assistant III
Philisa Merino-Dent

Procurement

- Procurement Manager
Edvige (Gigi) Tisdom
- Procurement Analyst IV
Lenore McCall
- Pro-Card Administrator III (new)
In Recruitment
- Pro-Card Administrator IV (new)
On Hold



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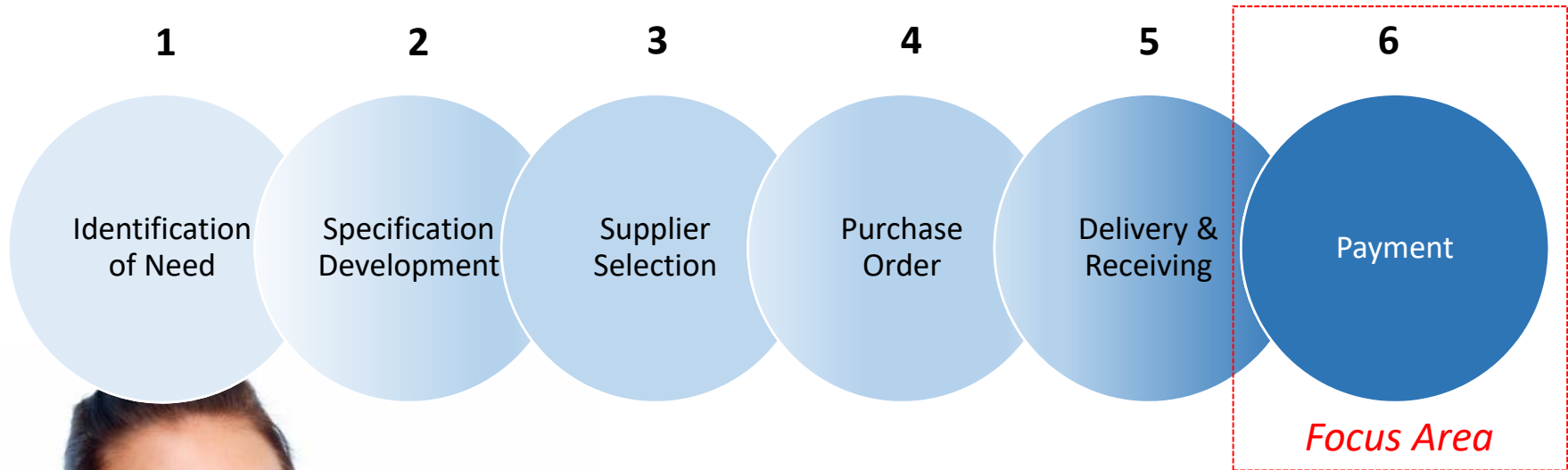
Accounts Payable

** New invoice processing procedure coming*



Accounts Payable

Procure-to-Pay

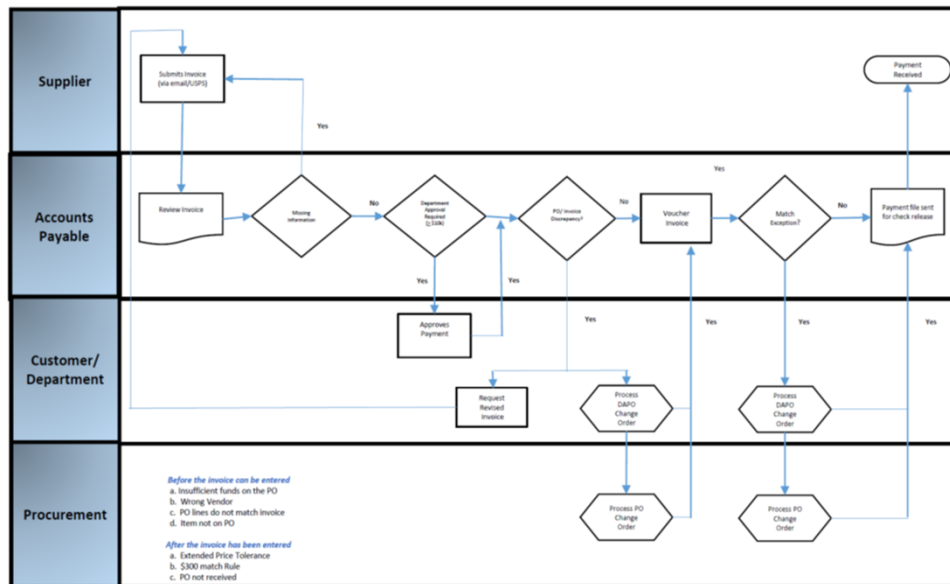


6 distinct phases



Accounts Payable

Current Invoice Processing Workflow



Process improvements implemented with limited success

1. **Created a supplier e-mailbox for invoice submission –**
effectiveness limited due to inappropriate use for inquiries, submission of other documents, etc. Requires invoices to be printed and later re-scanned into files.
2. **Introduced Kofax as an invoice scanning solution –**
Full implementation has been pending for 3+ years due to additional system configuration requirements and backlog for I.T. support.



Accounts Payable

New Invoice Processing Workflow *(Proposed implementation: Fall 2018)*



How It Works





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eBuy/ Procurement Services

- * LVPA Increases
- * Unauthorized Purchases
- * eCatalog Content Management
- * Uniform Guidance Requirements



Low Value Purchase Authorizations (LVPA)

- Effective August 1st 2018. All Department Transactors and P-Cardholders delegation authority will be increased
From: \$2,500 To: \$5,000
- Total DAPO value cannot exceed \$5,000, including applicable sales tax
 - “Misc Agreements and supplier specific agreements will be automatically increased
 - Note: Equipment items should not normally be procured on a DAPO or P-Card; please consult with Procurement Services before proceeding
- Purchase requests for **a single product** equal to or greater than \$5,000, including sales tax, must be forwarded to Procurement Services for processing using an eBuy requisition
- Other than the dollar threshold, all current processing policies and procedures remain unchanged



Unauthorized Purchases

There has been an increase in the number of **ePay requests for reimbursement** that are considered **unauthorized purchases**

- If cash or personal credit card is used to buy a product on behalf of UCR without a purchase order, it is considered an **unauthorized purchase**. In order to allow reimbursement, an unauthorized purchase form must be completed, signed and submitted with the documentation.
- Suppliers must receive a Purchase Order/DAPO prior to delivering goods or providing services





What is an Unauthorized Purchase?

- An “Unauthorized Purchase” is a purchase transaction that does not follow standard procurement policies and procedures, does not contain appropriate approval authorizations and/or does not use one of the following processing tools to procure product and/or services on behalf of “UCR”:
 - **Requisition** *(to Procurement)*
 - **DAPO**
 - **UCR P-Card**

For more information see: Policy 200-14, Charges without benefit of and with a Purchase Order
Policy 750-63, Purchasing Authority

Unauthorized Purchase Approval Form

Example

UNAUTHORIZED PURCHASE DECLARATION FORM

Instructions for use: If a department accepts responsibility for payment of incurred charges from an unauthorized purchase, the department must submit this form along with a purchase requisition to Procurement Services in order to initiate payment.

Unauthorized purchases are purchase transactions that are either entered into by an individual that is not authorized to contract on behalf of the University, or entered into by an individual normally authorized to contract, but who uses an unauthorized procurement method, or exceeds their delegated authority. (See Campus Policy [750-63](#).)

Part I. UCR Department

Department or Unit Name: **SCHOOL OF ROCK**

Requisition Number or Control Number (if known): **ABC123456**

Part II. Supplier Information

Vendor: **CAPITAL RECORDS, INC.**

Unauthorized Item or Service: **PROFESSIONAL SERVICES - 2 HOURS OF STUDIO RECORDING (AT A TOTAL COST OF \$3,500)**

Part III. Statement explaining the circumstances surrounding why Procurement Services was not contacted prior to obtaining this product or service and the steps taken to prevent reoccurrence: **WE HAVE A PROFESSIONAL SERVICES CONTRACT WITH ARISTA RECORDS FOR THIS WORK. HOWEVER THEY EXPERIENCED A POWER FAILURE AND WAS UNABLE TO SERVICE OUR REQUEST. WE WERE ON A DEADLINE TO COMPLETE A SPECIAL PROJECT WITHIN 36 HOURS AND DID NOT HAVE TIME TO SUBMIT AN EBUY REQUEST OR CREATE A DAPO, ETC. THIS IS A ONE TIME OCCURRENCE DUE TO URGENCY.**

Part IV. Certification (person responsible for unauthorized transaction)

I certify that the statement above is true and accurate. In addition, I have read and agree to comply with Campus Policy [750-63](#) regarding future transactions.

Name: **JOHNNY "GUITAR" DOE**

Title: **MUSIC DIRECTOR**

Signature: Johnny Doe Date: July 18, 2018

Part V. Department Approval (Financial Officer)

I approve payment of the incurred charges resulting from the unauthorized purchase described above.

Name: **JANE MUSE**

Title: **DEAN OF MUSIC**

Signature: Jane Muse Date: July 18, 2018

Example



eCatalog Content Management

Currently identifying new eBuy agreements and eCatalogue opportunities.

- *Objective:* expand purchasing options and drive increased utilization. These new sources are being identified through procurement's review of transactor's last 2 years of LVPA purchasing history and in collaboration with UCOP

eCatalog suppliers generally saves time, has competitive pricing, and provides increased value/benefit

- Since May 2018, Procurement Services has identified and added new sources of supply:

Company

- Controlco (BMS)
- Amerisource Bergen
- Illumina

Category

Facilities & Maintenance
Health & Science
Life Science

Upcoming adds in progress:

- | | |
|------------------------------------------------------|--------------------------|
| • Consolidated Elect. Dist. (Million Lamp Challenge) | MRO |
| • Fastenal | MRO |
| • Grainger | MRO |
| • Dasher | IT Infrastructure |
| • ePlus IT - IT Infrastructure - ePlus/Cisco | IT Infrastructure |
| • Siemens | Facilities & Maintenance |
| • Sunbelt eParts | MRO |
| • Office Depot (consortium) | Office Supplies |



eCatalog Content Management

Local Sourcing events planned (examples):

Products

Bus/Van Charter Services

Security

Audio-Visual Equipment

Fuels

Paper

Fleet Vehicles

Promo Products

Research Equipment



Category

Transportation

Services

Information Technology

MRO/Transportation

Office Supplies

Vehicles/Transportation

Marketing/Communications

Life Science





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New Review Requirement Information Technology Solutions Review



ITS Review

Information Technology Solutions must review all technology related requests prior to purchase

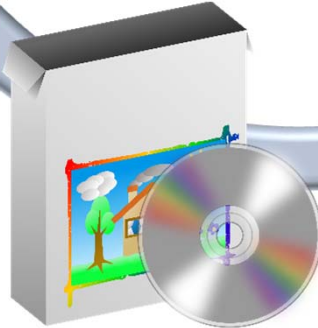
Equipment



Professional IT Services



Applies to products to be installed on or connected to the UCR network (whether permanently or temporarily) regardless of dollar value. **It also applies to services** related to software and/or Hardware installation where manipulation or modification of the existing system is necessary, or service provider has visibility to University data.



Software

ITS Contact:
Olivia Lara
Information Technology Solutions
olivia.lara@ucr.edu
Ph: 951-827-5270

Review not required for agreements established by Procurement



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New Review Requirement Environmental Health & Safety

Sheila Hedayati
Director, EH&S



EH&S Discussion Points

EH&S Mission

To provide leadership and services that enhance the research and educational process by integrating excellent health, safety, and environmental practices into the campus culture and activities through the [Integrated Safety and Environmental Management](#) (ISEM) system.





EH&S Program Areas of Oversight

Laboratory Safety

- Biosafety
- Chemical Safety
- Radiation Safety
- Laser Safety
- Controlled Substances and Precursor Compounds

Industrial Hygiene

- Environmental Sampling
- Mold, Indoor Air Quality, Exposure Assessments

Environmental Management

- Above Ground/Underground Storage Tanks
- Soil, Air, Stormwater Programs

Hazardous Waste

Public Health/Environmental Health

- Food and Pool Inspections

Safety Training

- Online course
- In person
- Customized

General Safety

- Accident Investigations
- Job Hazard Analysis
- Theatre Safety
- Facilities Services
- Dining/Housing

EH&S Key Areas of Concern

- **Chemical Hazards/Chemical Security**

- Chemical Carcinogens
- DEA Controlled Substances
- Chemical Facility Antiterrorism Standards (CFATS)



Department of
Homeland
Security

- **Biological Hazards**



- Viruses, bacteria, human blood/blood products
- Anthrax, botulinum toxin (APHIS/CDC Select Agents and Toxins)





EH&S Key Areas of Concern

- **Radiological Hazards**

- P-32
- Irradiators
- X-ray units, radiation producing machines

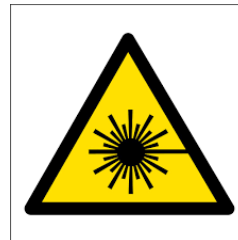


- **Lasers**

- Class 3b, 4

- **Scientific Equipment**

- Machine shop equipment
- 3D printers
- equipment that requires safety assessments prior to installation or use





Why Should EH&S Know?

- Training
- Inventory Control
- Public Health and Security
- Accident/Release Prevention
- Proper set up/installation



EH&S Efforts and Future Goals

Current Status

No system to notify EH&S of hazardous materials or operations on campus

Reactive approach is inefficient, increases costs and risk of injury/illness/diversion

Goal

Proactively integrate safety review to purchasing process to identify items of concern, reduce frustration and risk to campus



EH&S Proposed Next Steps

1. Work with Procurement and end Users to identify commodities that EH&S would like to review
 - either prior or concurrent to approval
2. Identify and define a workflow to trigger EHS notification
 - Phase I- manual process
 - Phase II- programmed into review process
3. Assess and refine based on user experience



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Uniform Guidance Requirements



Uniform Guidance

On December 26, 2013, the Office of Management and Budget (OMB) and the Council on Financial Assistance Reform (COFAR) published Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, 2 CFR Chapter I, Chapter II, Part 200 (Uniform Guidance).

The Uniform Guidance is the culmination of a 2-year effort to harmonize and streamline administration of federal assistance awards (grants and cooperative agreements).

It combines 8 previous OMB circulars covering the areas of administrative requirements, cost principles and audit requirements. In addition to addressing the administration's goal of a government that is more efficient, effective and transparent, the UG also seeks to reduce waste, abuse and burden in the administration of grants and other federal assistance awards.

The UG became effective December 26, 2014, with the exception of Audit Requirements, which went into effect the first full fiscal year after the effective date (starting July 1, 2015, for the University of California). In addition, there was an initial 1-year grace period to comply with the new procurement standards that was extended for two additional years.

Non-Federal entities are required to document whether it is in compliance with the old or new standard, and must meet the documented standard.

The Uniform Guidance Procurement Standards became effective on July 1, 2018







Uniform Guidance

Procurement Standards

Procurement standards are covered in Title 2, CFR, Sections 200.318 through 200.326 and are generally based on the requirements in OMB Circular A-102. The Council on Financial Assistance Reform (COFAR) recommended OMB utilize the A-102 to better mitigate the risk of waste, fraud and abuse.

General Procurement Standards:

	<u>UCR Status</u>
1. Use (UC) documented procurement procedures that reflect applicable state laws, provided they also conform to applicable Federal law	
2. Maintain oversight to ensure Suppliers perform according to terms, conditions, & specs	
3. Maintain written standards of conduct on conflicts of interest	
4. Avoid unnecessary or duplicative purchases (consolidation of purchases)	



Uniform Guidance

Methods of Procurement

<i>Micro-purchases*</i>	<\$10,000	Awarded w/o quotes, if \$ is reasonable and rotating suppliers
<i>Simplified (Small) Purchases</i>	\$10,000-150,000	Follows small purchase procedures (UC threshold is \$100,000)
<i>Sealed Bids</i>	\$150,000 or greater	Publicly opened, low bid award, (UC threshold is \$100,000)
<i>Competitive Proposals</i>	\$150,000 or greater	Used when sealed bid format is not appropriate (UC threshold is \$100,000)
<i>Sole Source</i>	>\$10,000	Where competition is restricted

* Our current DAPO limit is \$2,500, soon to be \$5,000. Procurement Services is evaluating UCR's ability to maintain policy compliance. Once key controls are in place the threshold will be re-evaluated.



Uniform Guidance

Conflict of Interest

The UG requires the written disclosure of any potential conflict of interest to the Federal awarding agency.

The department requestor must report any potential business relationship with a contracting party





Uniform Guidance

Documentation

Under UG, the following thresholds trigger additional purchase documentation and requirements:

- \$10,000 - \$149,999.99 (inclusive of tax and shipping)
 - Price reasonableness and the history of the purchase must be documented
 - Two or more quotes are required where competition exists for transactions between \$10,000 & \$150,000 (the UC maximum threshold is \$100,000)
- > \$149,999.99 (inclusive of tax and shipping)
 - This threshold requires a competitive environment, which will take care of the documentation for purchase history, cost analysis and price reasonableness
 - Competitive bids or proposals required from at least three sources
- Sole Source justifications will be required when competition is restricted for any transaction exceeding \$10,000 using federal funds





Uniform Guidance & UCOP



UCOP PROCUREMENT SERVICES SOURCE SELECTION & PRICE REASONABLENESS JUSTIFICATION FORM For federally funded purchases ≥\$10,000 and non-federally funded purchases ≥\$100,000

This document is to be completed by the requesting Department for all federally funded purchases ≥\$10,000 (including tax) & non-federally funded purchases ≥\$100,000 (excluding tax), to substantiate the appropriateness of source selection and price reasonableness. Locations are strongly encouraged to seek competition even in cases where the goods and/or services are exempt from the requirement to competitively bid.

Requisition #: _____ Dollar Amount: _____
Desired Supplier: _____ Campus Department: _____

DRAFT

I. **SOURCE SELECTION - REQUIRED** – Check the applicable box from one of the funding sections below. If an existing agreement is being leveraged and you have a copy, attach it to the requisition.

Note, only check the applicable boxes directly below your funding source

Federal Funds

- New or Existing Formal Competitive Bid# If known _____
- Competitive Proposals of ≤\$100K (Complete III & VII)**
- Sole Source (Complete II, IV, & VII)
- Registered Small Business (Only <\$100K; Complete II & VII)

Non-Federal Funds

- New or Existing Formal Competitive Bid# If known _____
- Sole Source (Complete II, IV & VII)
- Professional/Personal Services (Complete II, V, & VII)
- Unusual & Compelling Urgency (Complete II, VI & VII)

II. **PRICE REASONABLENESS – REQUIRED** *if* Sole Source, Small Business, Professional/Personal Services, or Unusual & Compelling Urgency is checked in Section I.

As required by the CA Public Contract Code and FAR provision Subpart 15.4, **how did you determine this is a fair and reasonable price?** (Whenever possible, base price reasonableness on comparable/similar quotes (FAR 13.106 3). _____)

Can you compare the price to historical prices paid for the same or similar items? Did you perform market research or verify the pricing on a published price list/catalog? _____

For FEDERAL grants with non-competitive sole source orders ≥ \$250,000, 2 CFR § 200.323 requires that we negotiate profit as a separate element of the price. Please describe above how the vendor's profit was negotiated. _____

FEDERAL DFAR contracts ≥ \$750,000, require that Suppliers submit certified cost or pricing data. Truth in Negotiations Act (TINA) (10 U.S.C. 2306a and 41 U.S.C. chapter 35. Provide the Supplier's information meeting this requirement here: _____

III. **COMPETITIVE PROPOSAL** (complete **ONLY** if **Competitive Proposal** is checked in Section I above)

Competitive Proposal is the examination of a supplier's price by comparison with reasonable price benchmarks. To comply with 2 CFR § 200.320(b), price or rate quotations must be obtained from three (3) qualified sources. **Skip Sections IV-VI, if you are** selecting the lowest priced supplier. If selecting a higher priced supplier, please state your justification in Section II.

PLEASE OBTAIN THREE (3) **COMPETITIVE PROPOSALS**. ATTACH COPIES OF THE COMPARISONS AND COMPLETE THE FOLLOWING:

Supplier A: _____ Price: _____
Supplier B: _____ Price: _____
Supplier C: _____ Price: _____

COMPARISON DISCOUNTS



UCOP PROCUREMENT SERVICES SOURCE SELECTION & PRICE REASONABLENESS JUSTIFICATION FORM For federally funded purchases ≥\$10,000 and non-federally funded purchases ≥\$100,000

Has the supplier applied any educational, state, or other discounts? Yes No
If yes, what is the total dollar savings or percentage of savings? _____

IV. **SOLE SOURCE** – (Complete the below boxes **ONLY** if Sole Source is checked above)

When there is only one supplier that can meet your product/service requirements, 2 CFR § 200.320(f) allows for procurement by noncompetitive proposals using the below criteria.

Note, only check the applicable boxes directly below your funding source

Federal Funds

- One of a kind
- Emergency
- Awarding Agency Approval
- No Competition (Grant Funds Only)

Non-Federal Funds

- One of a kind
- Unique
- Match existing list UC PO# _____

DRAFT

Detail the unique circumstances and/or specifications that make this the **only** supplier capable of meeting your requirement and **why other suppliers were not selected**; i.e. specifications that didn't meet performance requirements. Pre-work with the selected supplier to customize the equipment, thereby excluding competition, is not an allowable justification. Price, brand names, and/or geographical preferences cannot be part of this justification. _____

V. **PROFESSIONAL OR PERSONAL SERVICES**- Define the unique qualifications that the selected supplier will provide. Complete this Section for non-federal orders **ONLY** if Professional or Personal Services is checked above. _____

VI. **UNUSUAL AND COMPELLING URGENCY** – (NON-FEDERAL FUNDS **ONLY**) Failure to act immediately on this purchase might result in: significant bodily harm, significant property loss or damage, violations of law or University policies, or cause significant liability to the University or to members of the University community. Please describe how you determined that this is an Unusual and Compelling Urgency if checked above. _____

VII. **CONFLICT OF INTEREST STATEMENT – REQUIRED**. To the best of my knowledge, no UC employee or near relative of a UC employee is the supplier or holds more than a 10% ownership or controlling interest in the supplier OR the UC employee is exempt because he/she has teaching or research responsibilities and the goods or service is not commercial. I am the individual who has gathered and provided this detailed information and any further questions regarding these details can be directed to my attention.

I certify that this purchase will not present a conflict of interest as defined by university policy and that I have received no income, gifts or gratuities from or have an investment in this supplier. **Agree**

If you do not agree with the above statement, please provide an explanation: _____

By initialing below, I hereby certify the foregoing is true and correct to the best of my knowledge.

Department End User Initials/Signature: _____ Department End User Name: _____
Email and Phone number: _____ Date: _____



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Questions?????



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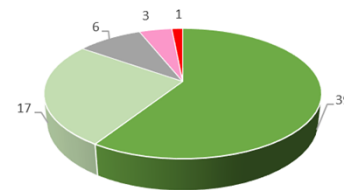
Appendix



Feedback Survey – March 2018

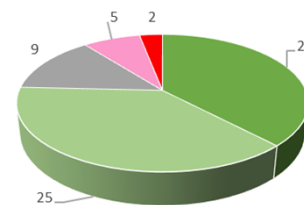
1 The meeting and materials were relevant to my daily business activities

Meeting & Materials Were Relevant



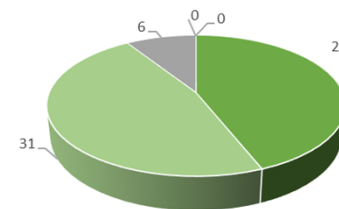
2 My time at the meeting was used wisely

My Time Was Used Wisely



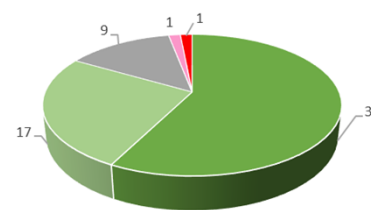
3 The presenters were knowledgeable of the subject matter

Knowledgeable Presenters

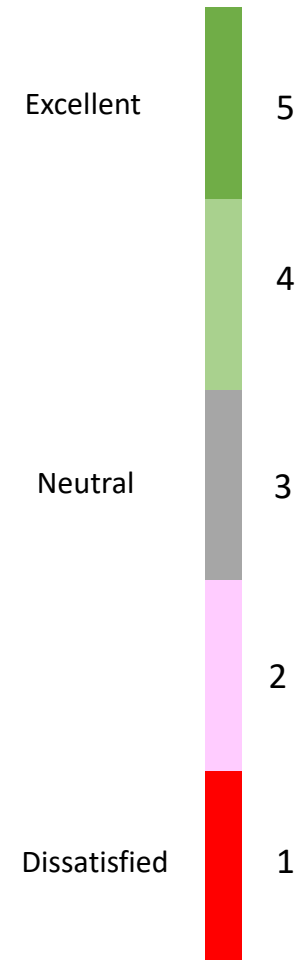


4 The meeting environment (room, temperature, lighting, materials) was a conducive learning environment

Meeting Room Environment



Rating





Feedback Survey Comments

Following are questions/comments received from the previous Users Group Meeting. We were unable to prepare responses due to year end close activities. However, we are working a response to each question and will either post as Q&A on our website or provide them in an email by early August. (We've done our best to incorporate many of your comments into this presentation.)

Comments

Gen	Charts not readable from 3rd row
P/S	Bidding Guidelines webpage if possible
Gen	Flow charts as webpages
Gen	Answered a lot of my questions
P/S	Cover bidding process when purchasing does it for the department
Gen	Information was helpful
P/S	Thanks for going through the entire purchasing process in a clean/efficient manner
Gen	Ellery needs to interrupt less and plan his agenda better with the staff. He sounded angry and irritated. It doesn't help the overall climate
A/P	Who to send the name of recipients for award winner?
P/S	Most of it I know as I have purchased for 10+ years. Good information for new purchasers.
Gen	Tables on slides were too small. Hard to read and follow along. Seems like you are trying to fix problems you are having in accounting. Maybe additional mandatory trainings be required for new employees.
Gen	Need more time for questions
P/S	Ana Cotton provided good information - it was the most useful to me.
P/S	Clarify pro-card usage - when appropriate? After storehouse and eBuy vendors have been checked?



Feedback Survey Comments

Comment

P/S	Good job! Keep us posted on staff updates so we know who to contact for each issue
Gen	I would spend lesss time on survey feedback so we can get to more important topics and Q/A
Gen	Maybe just one slide on feedback instead of intro, review, qualifiers, and results
Gen	Ellery should go over ppt w/ team so he doesn't interrupt as often and allow staff to be the experts that they are
Gen	Too much time on survey feedback
Gen	Need more time for Q/A as meeting is already too long.
P/S	Ana's presentation was great! Eye-opening for many by the reactions in the room
Gen	Meeting was fairly redundant and mirrored in previous meetings. No new information was presented but I am looking forward to the new trainings that may be offered in the future regarding procurement of services or involving contracts
A/P	Regarding AP, it always seems like she is washing the blame off her team and placing it all on the dept level. This is not helpful in promoting a good relationship between AP and the departments, it creates animosity and resentment.
A/P	Cannot get a reply from anyone at AP for 2 days, per their out of office email replies, and even then it is more than 2 days with follow-ups!
Gen	Hands on, interactive training would be helpful
Gen	Good job this time around
Gen	A lot of it was old
P/S	You mentioned we should look to see if the item has been ordered/purchases before by UCR. How do we go ahead and do that?
Gen	Images should be bigger as they were hard to read/make out & I was sitting in the 3rd row, I'm sure the last row was unable to see it at all.
A/P	Invoices that take longer than 30 days. What to do?



Feedback Survey Comments

Comment

- P/S Future meeting topics & demonstration - Change order - Release encumbrance
- A/P Redundant. Epay training through LMS covers 90% of this topic. At this level, transactors should already be well versed with all of these topics. Time should be spent discussing changes to policy/practice
- P/S Many slides say reach out to purchasing for assistant/questions - What is the SLA for response time? - I'm too busy has been the response
- P/S The PO process was very helpful, especially the process in which the PO goes through to get paid
- A/P If AP is not receiving invoice why not CC: the supervisor of the transactor
- P/S Please review BKM orders and explain prevailing wage differential. Should all BKM orders (even under \$10,000) be submitted as a requisition in eBuy?
- A/P Payment requests from eBuy vs Invoices - When does AP require a payment request printed out from eBuy?
- P/S FAU change order requests. If FAU change order on orders over \$2500, who to contact and what is the procedure?
- Gen Too cold/yesterday it was too hot
- Gen Please use pointer for screens - Would have been better to have laptop w/ actual PO tabs then pointer could be broadcast to both screens?
- Gen One of the presenters needs more trainings on effective communication. That portion of the presentation was difficult to follow and understand. Everyone else was clear and effective
- Gen Please send the agenda prior to the meeting
- A/P PO's paid without been received from dept?
- A/P All invoices are better to sent by interoffice envelope or AP invoice?
- Gen I didn't get an agenda by email as mentioned
- P/S Bidding guidelines slide on ppt - Very small & cannot see the information
- P/S Annual review of how to address issues with POs, creating a PO/adding new vendor/each line of the PO, what they're for,etc....



Feedback Survey Comments

Comment

P/S	Be more elaborate on the 'checking out orders' as I've done it once & don't recall what it is & how to do it
A/P	What is a 'credit hold'? Elaborate!
Gen	Please send powerpoint & agenda in advance. Also, please book a room with tables to take notes especially since the notes aren't published before hand
Gen	Leave time for questions or post an FAQ on the website
Gen	3 months between meeting is too long
Gen	Provide an agenda that reflects learning level
A/P	How long will payment be issued to vendor after a PO has been marked okay to pay. A quicker process would be nice
Gen	Do not use my time to review survey results - just send out via email. Our time in meetings is valuable.
Gen	Agenda was not sent ahead of time for this meeting. It would have been nice to know this was a training session
Gen	Way too much time spent going over survey results. The intro to this meeting was 11 minutes long - it could have been just a few minutes. No meeting agenda was sent for this meeting
P/S	We have great departmental training for how to use eBuy so I could have skipped everything except for the few minutes spent on the eBuy system. Which did contain some useful tricks and tips. Thank you for that!
A/P	Would you like PO #'s in the subject line when invoices are sent to AP invoice?
P/S	It is my understanding that change orders to change vendor information after the PO has been encumbered cannot be done. The PO must be cancelled and redone under the correct vendor/address. Your presentation said it could be done via change order. Often, we will match a vendor and address based on the paperwork we have, then the vendor will decide to invoice with a different remit to address. Or, the vendor later changes their FEIN# and we won't know till its too late. Any ideas/ assistance to prevent or fix this would be much appreciated.