# **Purchasing and Payment Services Quick Guide for Departmental Requestors**

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## **Vanderbilt University Email Addresses for the P&PS department:**

* [invoices@vanderbilt.edu](mailto:invoices@vanderbilt.edu) is only for invoice submission (no inquiries, statements, purchase orders, etc.), emails sent here are rarely read, we only forward attachments to a scanning system
* [PaymentServices@vanderbilt.edu](mailto:PaymentServices@vanderbilt.edu) is for all invoice and payment inquiries
* [SupplierRecords@vanderbilt.edu](mailto:SupplierRecords@vanderbilt.edu) is for any changes/updates/additions to a supplier record that the supplier cannot complete in the vendor self-service portal
* [PurchasingServices@vanderbilt.edu](mailto:PurchasingServices@vanderbilt.edu) is for inquiries related to requisitions and purchase orders the requester does not know the Buyer assigned to the order
* [PaymentCardsExp@vanderbilt.edu](mailto:PaymentCardsExp@vanderbilt.edu) is for questions regarding OneCard purchasing and policies, as well as expense reports and reimbursements
* [Travel@vanderbilt.edu](mailto:Travel@vanderbilt.edu) is for travel booking and policy questions, as well as the Concur online booking tool

## **Supplier Records FAQs**

* [Diversity Classification Definitions](https://vanderbilt.box.com/s/eb0ikhd200ex5vx32zccqltz7ywxo0a5)
* [Step-by-step guide for the supplier self-registration portal](https://vanderbilt.box.com/s/uuprtlzjvrc3riyedw12zsroly6k7xjd)
* [New Supplier Registration Guide for Vanderbilt University Requesters](https://vanderbilt.box.com/s/7354pe237st4aq671ff1g7uflkm3bso7)
* [Locating a supplier record in Oracle](https://vanderbilt.box.com/s/d13ubembwbagfve6k0g8fiulmuczl6nz)
  + Basic search, advanced search, searching using the wildcard function and searching by diversity classification
* [How to view a status of an external registration request](https://vanderbilt.box.com/s/anhzeziihtuh0qrmb6txcdyfyv9ix0q7)
* [Accessing your transaction worklist in Oracle](https://vanderbilt.box.com/s/jqm2sx7gep0el84cxne80wysq694psie)
  + This is a guide to help you easily view assignments in Oracle such as supplier registration RFIs, invoice approvals, etc.

## **Purchasing Services FAQs**

* [Requisition and Purchase Order Statuses in Oracle Cloud Procurement](https://ecsr.fa.us2.oraclecloud.com/crmUI/faces/FuseOverview?fnd=%3B%3B%3B%3Bfalse%3B256%3B%3B%3B&fndGlobalItemNodeId=c_14c2165ceb92475f957f76003e9ceade&_afrLoop=6338138704281425&_afrWindowMode=0&_afrWindowId=rhnpx8ga6&_adf.ctrl-state=9mimun9i7_153&_afrFS=16&_afrMT=screen&_afrMFW=1280&_afrMFH=881&_afrMFDW=1280&_afrMFDH=1024&_afrMFC=8&_afrMFCI=0&_afrMFM=0&_afrMFR=96&_afrMFG=0&_afrMFS=0&_afrMFO=0)
* [Quick Reference Guide: Smart Form Request Types](https://vanderbilt.box.com/s/i3esuk772chqoi7dlskb4tj0s854opwx)
* [General Purchasing Policy](https://finance.vanderbilt.edu/policies/General_Purchasing_Policy.pdf)
* [Supplier Justification Form](https://ecsr.fa.us2.oraclecloud.com/crmUI/faces/FuseOverview?macKey=tJjRd2dGkKv1S%2BGK)
  + Supplier Justification Forms are required for all orders totaling $25,000 individually or in aggregate. Please refer to the General Purchasing Policy for additional information.
* [Requester Training](https://ecsr.fa.us2.oraclecloud.com:443/hcmUI/faces/deeplink?objType=WLF_LEARN_LEARNING_ITEM&action=NONE&objKey=learningItemId%3D300001930012491)
* If my requisition has already been approved, can I make changes to it?
  + Yes. The original requester of a purchase requisition will be able to initiate changes to a requisition by selecting the requisition from the “Manage Requisitions” panel of Oracle’s Procurement module and initiating the edit order function from the Actions menu. Changes to an existing PO line can also be made after requisition approval and after the issuance of a purchase order by selecting “Manage Order.” Common change orders that can be initiated by the department include but are not limited to funding source revisions, quantity revisions, price revisions, etc. The most comprehensive resource available to you relating to this system is the procurement requester training. Even if you have already completed the training, you can go back and watch any individual video. Most of them are less than 5 minutes long and about a very specific topic:
* When a department member transfers laboratories or is no longer working at Vanderbilt University, what is the process of transferring their activity for confirmation and approvals?
  + The appropriate course of action to complete a reassignment of Oracle activity from one requester to another is to notify [PurchasingServices@Vanderbilt.edu](mailto:PurchasingServices@Vanderbilt.edu) that the requester is leaving and who their replacement is.
* [Identifying your area’s Financial Unit Manager (FUM)](https://ecsr.fa.us2.oraclecloud.com:443/fscmUI/faces/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3DHFAQ86%3Blocale%3Den_US&action=EDIT_IN_TAB)

## **Payment Services FAQs**

* [Policies for Payment Services – Includes the following](https://finance.vanderbilt.edu/purchasingandpaymentservices/paymentservices/):
  + [Accounts Payable Corrections Policy](https://ecsr.fa.us2.oraclecloud.com:443/fscmUI/faces/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3DPOL55%3Blocale%3Den_US&action=EDIT_IN_TAB)
  + [Independent Contractor Policy](https://ecsr.fa.us2.oraclecloud.com:443/fscmUI/faces/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3DPOL62%3Blocale%3Den_US&action=EDIT_IN_TAB)
  + [Invoice Processing Policy](https://ecsr.fa.us2.oraclecloud.com:443/fscmUI/faces/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3DPOL57%3Blocale%3Den_US&action=EDIT_IN_TAB)
  + [NPO Payment Policy](https://ecsr.fa.us2.oraclecloud.com:443/fscmUI/faces/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3DPOL60%3Blocale%3Den_US&action=EDIT_IN_TAB)
  + [List of payment methods and definitions](https://vanderbilt.box.com/s/5y4vu7bpxmsgyphl72mzgsbj5j7fe4ko)
  + [Tax forms and Certificates](https://finance.vanderbilt.edu/accounting/tax_exemption.php)
  + [International Tax FAQs](https://hr.vanderbilt.edu/international-tax/)
* [Determining Invoice status](https://ecsr.fa.us2.oraclecloud.com:443/fscmUI/faces/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3DTECH29%3Blocale%3Den_US&action=EDIT_IN_TAB)

## **Cards and Expense FAQs**

* [Payment Cards & Expense](https://finance.vanderbilt.edu/purchasingandpaymentservices/paymentcardsexpensereports/index.php)
* [Policies](https://finance.vanderbilt.edu/policies/index.php)
  + One Card Policy
  + Travel & Expense Policy
  + Subject Participation Policy (gift cards/cash advances)
* [Procedures & Forms](https://finance.vanderbilt.edu/procedures-forms/index.php)
  + Cash Advance & Gift Card Request Form
  + Cash Advance & Gift Card Tax Tracking
  + Fuel Card Application
  + Fuel Card Checkout Log
  + Human Subject Participation Procedure
  + One Card Application
  + Student Checkout Card Application
  + Student Checkout Card Log
* US Bank 24-hour customer service: 1.800.344.5696

## **Travel FAQs**

* [Travel booking Frequently Asked Questions](https://finance.vanderbilt.edu/purchasingandpaymentservices/travel/documents/FAQ.pdf)
* Concur online booking tool Quick Guides:
* [Assign a Travel Assistant](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffinance.vanderbilt.edu%2Fpurchasingandpaymentservices%2Ftravel%2Fdocuments%2FConcur_Quick_Guide_Travel_Assistants.pdf&data=05%7C01%7Cwendy.b.doerges%40vanderbilt.edu%7C40d2071540f54578533508da68c973e5%7Cba5a7f39e3be4ab3b45067fa80faecad%7C0%7C0%7C637937511682951327%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=ysPLYeLEZXgyEr%2Fz53z%2B3ABiL4eqbqx0LsX%2B7nBYtOg%3D&reserved=0)
* [Global Entry & TSA Pre-Check](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffinance.vanderbilt.edu%2Fpurchasingandpaymentservices%2Ftravel%2Fdocuments%2FConcur_Quick_Guide_Global_Entry_TSA_Pre-check.pdf&data=05%7C01%7Cwendy.b.doerges%40vanderbilt.edu%7C40d2071540f54578533508da68c973e5%7Cba5a7f39e3be4ab3b45067fa80faecad%7C0%7C0%7C637937511682951327%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=fA4GpME9NbJ84ldEmeOtUsAvKYsr%2BhTKuFaM2z8bVnI%3D&reserved=0)
* [Guest Travel Reservations](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffinance.vanderbilt.edu%2Fpurchasingandpaymentservices%2Ftravel%2Fdocuments%2FConcur_Quick_Guide_GTC.pdf&data=05%7C01%7Cwendy.b.doerges%40vanderbilt.edu%7C40d2071540f54578533508da68c973e5%7Cba5a7f39e3be4ab3b45067fa80faecad%7C0%7C0%7C637937511682951327%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=mzwy56AL1I9wbF8bu7yBIBPKw4AgT0kzxRhPd5jRxe4%3D&reserved=0)
* [Updating Profile](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffinance.vanderbilt.edu%2Fpurchasingandpaymentservices%2Ftravel%2Fdocuments%2FConcur_Quick_Guide_Profile.pdf&data=05%7C01%7Cwendy.b.doerges%40vanderbilt.edu%7C40d2071540f54578533508da68c973e5%7Cba5a7f39e3be4ab3b45067fa80faecad%7C0%7C0%7C637937511682951327%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=10lYgWBn9SLYtJB8OTMUF64xwQzM4MYci80PKV36eX4%3D&reserved=0)