**Update on Purchasing and Payment Processes (June 2021)**

As the University moves to re-open in line with the government’s road map out of lockdown some restrictions on purchasing remain in place. To enable externally funded research to proceed more swiftly we have adjusted the approval processes for R code expenditure and provide below a helpful summary of procurement procedures.

This guidance explains the current requirements, and should be complied with. It applies to all members of the University and its subsidiaries including: staff, students and other associated individuals.

The main differences relate to whether you are on campus or off-campus:

|  |  |
| --- | --- |
| **I am on working on campus** | **I am working off campus** |
| Prior approval for spend implied - 1.3 below | Prior approval for spend required – 1.2 below |
| Your name must be on the return to campus register – 2.0 below |  |
| Access to ordering systems – 4.2.2 below | Access to ordering systems with added requirement – 4.2.1 below |
| Delivery – check the delivery location is open 4.3.1 below | Delivery - home delivery may be available – 4.3.2 below |
|  |  |
| **Applicable to any Purchases** | |
| New requisitioners – one-off requisition 3.1 or ongoing requisitions 3.2 below | |
| Access to stores – 4.1 below | |
| Travel may be booked – 4.4 below | |
| Using a corporate card to purchase - 1.1 and 4.5 below | |
| IT purchases – 4.6 below | |
| Payments – 5.0 below | |

1. **Updated Financial Procedures**
   1. For any purchase using a corporate card:

* **Paragraph 6.56/1A:** All RBS card purchase requests must include evidence of pre-approval by an SLT member. Before proceeding with the purchase, the request form, SLT approval and risk assessment, if relevant, must be sent to [foms@manchester.ac.uk](mailto:foms@manchester.ac.uk) for a formal review by a Finance Operations Manager.

1.2 The following changes to the University’s Financial Processes are still operating for any staff working off-campus:

* **Paragraph 6.25: Purchase Order Approvals:**  An additional first step requires approval by a member of Senior Leadership Team (SLT), or a delegated nominee, before a purchase requisition in raised.
* **Paragraph 6.27: Requisitions:** Evidence of this pre-approval must be attached to all Oracle requisitions.

To find your [SLT](http://documents.manchester.ac.uk/display.aspx?DocID=49154) approver

1.3 If you are working on-campus your name should be included on a Faculty Return to Campus Register (see below). Where you are included on this register SLT approval to spend is deemed to have been given and purchases can be undertaken largely as they were pre-pandemic.

1. **Return to Campus Register**

Local registers are maintained by each faculty; to be added or discuss anything to do with your local register please contact one of the following:

* **FSE:** Sarah Mullholland, Head of School Operations [sarah.mulholland@manchester.ac.uk](mailto:sarah.mulholland@manchester.ac.uk)
* **FBMH:** Kerrie Webb, Research Project Officer [kerrie.webb@manchester.ac.uk](mailto:kerrie.webb@manchester.ac.uk)
* **FHUM:** Philippa Woods, Head of Faculty Finance [philippa.woods@manchester.ac.uk](mailto:philippa.woods@manchester.ac.uk)
* **PS:** Contact your Director

1. **New Requistioners**

3.1 If you do not already have access to the Oracle Financial system you will need to:

* Fill out a [Requisition Request Form](http://documents.manchester.ac.uk/display.aspx?DocID=49552) and
* Email it to [requisition\_request@manchester.ac.uk](mailto:requisition_request@manchester.ac.uk).
* The Procurement Hub will process the forms and raise an Oracle requisition which will be approved through the system in the normal manner.

If you are requesting hazardous goods, you must contact your Health and Safety Advisor before placing the order. You will need to ensure any such goods can be transported and delivered to end users safely.

You must choose one of:

* Quick Select - Location: Stopford Building - Goods Inward
* Quick Select - Location: Chemistry Store
* Quick Select - Location: MIB Stores

You must also add your contact details in "Notes to Receiver" so the goods can be delivered on to you. For support please contact the [Procurement Hub](https://www.staffnet.manchester.ac.uk/procurement/procurement-hub/).

3.2 If you need access to requisition on a regular basis you can ask to be set up do so by completing the necessary forms for [Oracle\_access](https://www.staffnet.manchester.ac.uk/finance/systems/)

1. **Purchasing Items**

**4.1 University Stores** are open and operating largely as normal(you should check with the stores concerned)

* [BMH stores](https://app.bmh.manchester.ac.uk/facilities/stores/default.aspx)
* [FSE stores](http://documents.manchester.ac.uk/display.aspx?DocID=49523)

**4.2 Use of Ordering Systems (Oracle i-Proc and Advanced eMarketplace)**

4.2.1 For requisitioners working from home:

* I-Proc is available but prior approval for all spend is needed and evidence of this must be attached to the requisition in Oracle (as per 1.1 above) before the order is created and issued to the supplier
* Advanced eMarketplace is not available

4.2.2 For requisitioners working on-campus (and certain requistioners working on behalf of people on campus):

* I-Proc is available as normal (as per 1.2 above) but evidence that your name is on the return to campus register will be verified before the order is created and issued to the supplier
* Advanced eMarketplace is available

**4.3 Delivery Locations**

4.3.1 For any campus deliveries you must make sure that the ship to location is open/accessible and that any items can be safely received

4.3.2 Home Delivery (for people working from home) may be arranged in limited circumstances for everyday items that constitute a negligible risk in the home environment (such as books, mobile phones, stationery etc.) following consultation with your line manager/budget holder. In order to request this you should complete the following form and attach it to the requisition:

|  |  |
| --- | --- |
|  | Tick |
| If to be paid from research funds, supporting statements that the purchase will be funded. |  |
| Purchase is from an contracted supplier |  |
| You have provided a phone number and full home address |  |

Please ensure that deliveries follow current Covid guidelines for handling parcels and deliveries.

Hazardous items (such as chemicals, biological material, lab equipment etc.) must not be ordered for home delivery, however if your request is for delivery of an item that may carry a safety risk you should ensure that you secure appropriate approval and fully complete any risk assessment  before any purchase is made. If approval is given in addition to the checklist above all necessary risk assessment documentation must be attached to the requisition.

**4.4 Travel**

4.4.1 Restrictions on travel are still in place and necessary advice and guidance must be followed before any travel is booked.

4.4.2 For any intended travel you must:

* obtain a quote from the Key-Travel on-line booking tool: [how\_to\_guide](https://documents.manchester.ac.uk/DocuInfo.aspx?DocID=52030)
* complete a risk assessment
* obtain [SLT](http://documents.manchester.ac.uk/display.aspx?DocID=49154) approval
* share your Key travel booking with your School arranger: [arrangers](http://documents.manchester.ac.uk/display.aspx?DocID=52038)
* when booked the usual approval flow will be activated by the on-line booking

**4.5 RBS Purchasing Cards Requests**

4.5.1 Purchasing cards can be used in the circumstances prescribed for their use under normal circumstances.

4.5.2 It has been agreed that RBS Purchasing Card requests on ‘R’ codes no longer need individual approval from the University’s Senior Leadership Team. Please use the generic [Senior Leadership Team approval letter](https://documents.manchester.ac.uk/display.aspx?DocID=55863). Cardholders however are still required to obtain approval from Finance Operation Managers before card use.

**4.6 IT Purchases** must follow the specific rules relating to the purchase of any IT items: <https://www.itservices.manchester.ac.uk/ourservices/popular/purchasing/work/>

Only for purchases of IT equipment on R Codes (and only up to £5000) please use the generic Senior Leadership Team approval letter at <https://documents.manchester.ac.uk/display.aspx?DocID=55863>

**5.0 Payments** to suppliers and students are still being made normally so we can meet our legal obligations and that neither suppliers nor students are detrimentally affected. Invoices received electronically either to the ap-helpdesk@manchester.ac.uk or via eMarketplace will be processed. Paper invoices should be emailed to [ap-helpdesk@manchester.ac.uk](mailto:ap-helpdesk@manchester.ac.uk) and will be dealt with as per normal terms.

**6.0 Staff Expenses:** It has been agreed that Staff Expense claims on ‘R’ codes no longer needs individual approval from the University’s Senior Leadership Team.

This approval letter should be used as evidence of per request. Please attach this ‘letter of proof’ to your on-line Expense claim

Note that this only applies to requests on ‘R’ codes. Purchases on other codes are not applicable, and need to go through the standard process.