

PROCUREMENT & PAYMENT SERVICES

2024 Faculty Training

April 26, 2024



INTRODUCTION

Procurement & Payment Services is the central hub to meet university purchasing, contract management, payment, and travel needs. With a focus on customer engagement, we aim to create value through professional service, transparency, and university buying power. We uphold the highest standards of ethics and integrity and are committed to mission accomplishment for Liberty University!

Travel Services

- Travel Requirements
- Dos and Don'ts for Travel
- Concur



Year End Guidance

- All folios must be given to Travel Office no later than 5 days of end of trip for reconciling
- Create receipt on all trip POs by 6/14 EOD
- If you have outstanding Per Diems or reimbursements that need to be in FY24 budget, they must be submitted by 6/24
- Hotels/cars are paid after trip, so depending on timing could go to FY25 budget



Travel Requirements



Departmental approval



Budget approval



Use Concur for booking



Keep all itemized receipts



If not able to cover with P-Card, call the Travel Office

Do's and Don'ts for Travel



Do

- Book on Concur
- Contact Travel Office with questions
- Use the new Travel Request Form for all needs that will be above P-Card limit and for group travel*

Don't

- Book directly on supplier site
- Split payment to be able to put on P-Card*
- Sign a contract of any type (whether LU is paying or not)



Concur

- **Important information about Concur:**
 - Must complete profile upon log-in
 - Need to click through all pages until you reach the last one that says "finished!" or your trip is not booked
 - You are allowed to book personal travel on Concur and you can book for a guest as well
 - Non-refundable flights will provide a credit for future flight
 - We do not purchase basic economy
- **Updated Travel Policy has been made available on liberty.edu/finance-admin/procurement/travel/**

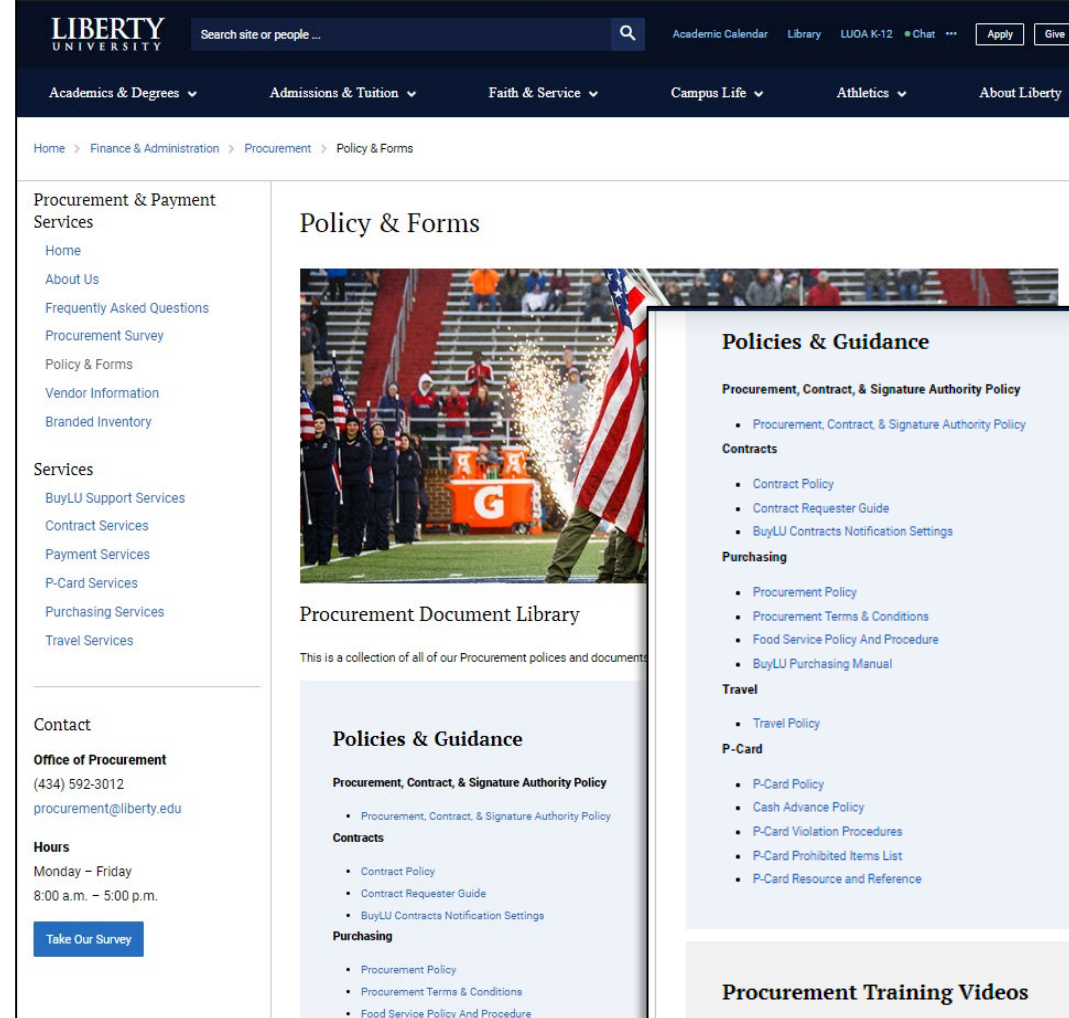


Thank You
Q&A



Procurement Training & Resources

- **Procurement Website**
 - Training Videos
 - Document Library
- **Procurement Training Month – April 2024**
 - Training schedule to be posted on [Procurement website](#)
 - Newsletter announcement



LIBERTY UNIVERSITY Search site or people ... Academic Calendar Library LUOA K-12 Chat Apply Give

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Home > Finance & Administration > Procurement > Policy & Forms

Procurement & Payment Services
Home
About Us
Frequently Asked Questions
Procurement Survey
Policy & Forms
Vendor Information
Branded Inventory

Services
BuyLU Support Services
Contract Services
Payment Services
P-Card Services
Purchasing Services
Travel Services

Contact
Office of Procurement
(434) 592-3012
procurement@liberty.edu
Hours
Monday – Friday
8:00 a.m. – 5:00 p.m.
[Take Our Survey](#)

Policy & Forms

Procurement Document Library
This is a collection of all of our Procurement policies and documents.

Policies & Guidance
Procurement, Contract, & Signature Authority Policy

- Procurement, Contract, & Signature Authority Policy

Contracts

- Contract Policy
- Contract Requester Guide
- BuyLU Contracts Notification Settings

Purchasing

- Procurement Policy
- Procurement Terms & Conditions
- Food Service Policy And Procedure
- BuyLU Purchasing Manual

Travel

- Travel Policy

P-Card

- P-Card Policy
- Cash Advance Policy
- P-Card Violation Procedures
- P-Card Prohibited Items List
- P-Card Resource and Reference

Forms & Templates
Contracts

- General ICA – Independent Contractor Agreement
- LUCOM ICA – Independent Contractor Agreement
- Master Purchasing Agreement
- Statement of Work
- Short Form Service Agreement For Guest Speakers & Performers

Purchasing

- ePayables Form
- Fund/Org permissions Request Form

P-Card

- Missing Receipt Form
- Tax Exemption Forms:
 - Home Depot Tax Exemption Form
 - VA Tax Exemption Form

Procurement Checklist & Timeline

- Procurement Process Checklist
- Procurement Process Timeline

Procurement Training Videos
General BuyLU Training Videos

- BuyLU Intro & Navigation
- BuyLU Shopping Dashboard
- BuyLU Catalog Requisitions
- BuyLU Commodity Codes
- BuyLU New Supplier Requests
- BuyLU Non-Catalog Item
- BuyLU Receiving
- Change Request for Non-Catalog Items
- Change Request for Catalog Items
- Finding Draft or Assigned Carts in buyLU

Dashboard Navigation Training Videos

- Approvals Dashboard
- Payment Services Dashboard
- Contracts Dashboard

Procurement Training Sessions Archive
2023
2024

Procurement Newsletter Archive
2023
2024

Procurement Announcement Archive
2023
2024

Contact Us

Purchasing Services

- procurement@liberty.edu
- (434) 592-3012

Enterprise Sourcing

- enterprisesourcing@liberty.edu
- (434) 592-5058

Contract Services

- contracts@liberty.edu
- (434) 582-7839

Payment Services

- acctspay@liberty.edu
- (434) 592-3166

P-Card Services

- pcard@liberty.edu
- (434) 582-2266

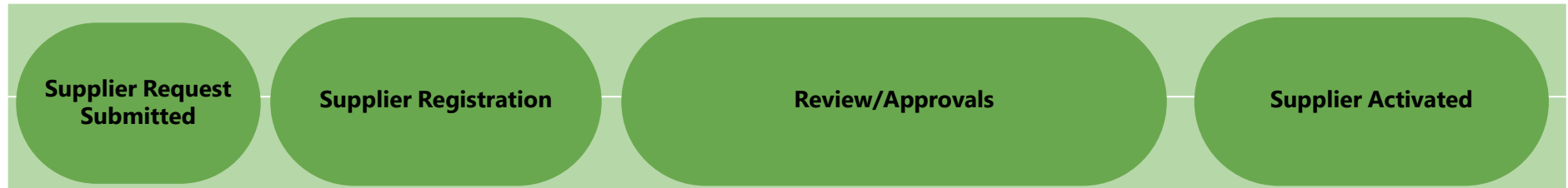
Travel Services

- travel@liberty.edu
- (434) 582-8760

Procurement Planning Timeline

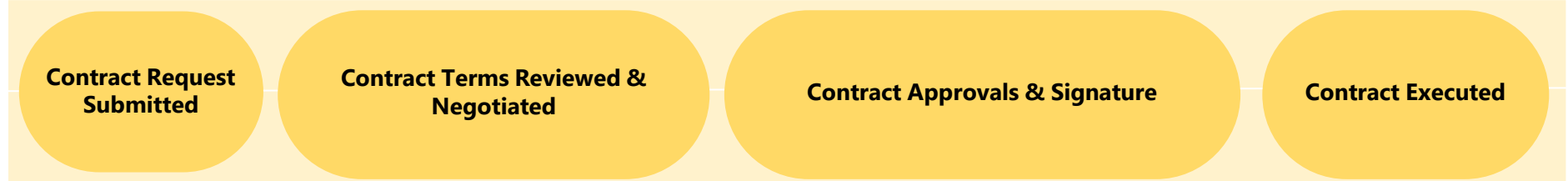
Supplier

Typical processing time: 1-3 business days



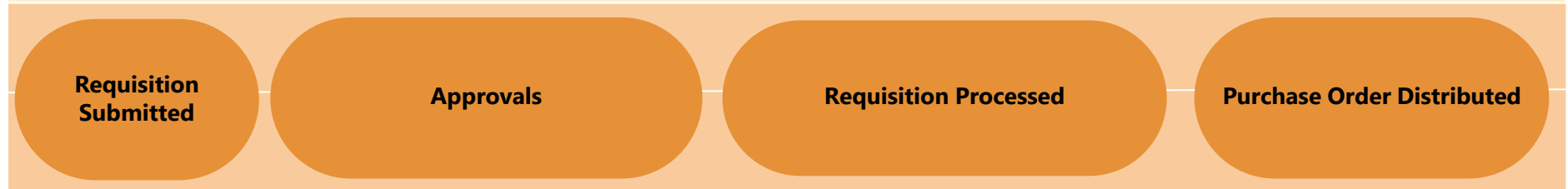
Contracts

Typical processing time: 30+ business days



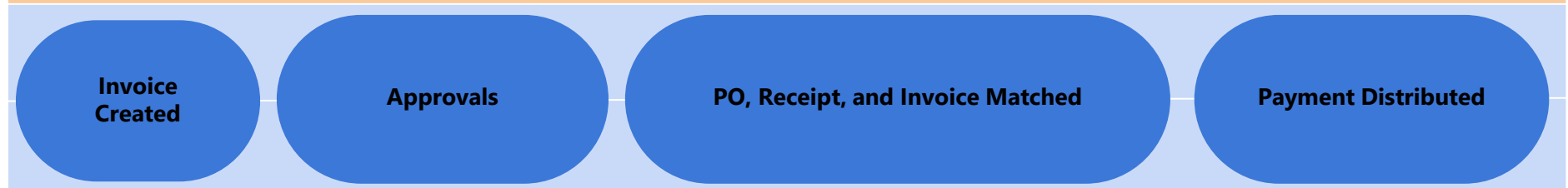
Purchasing

Typical processing time: 1-3 business days

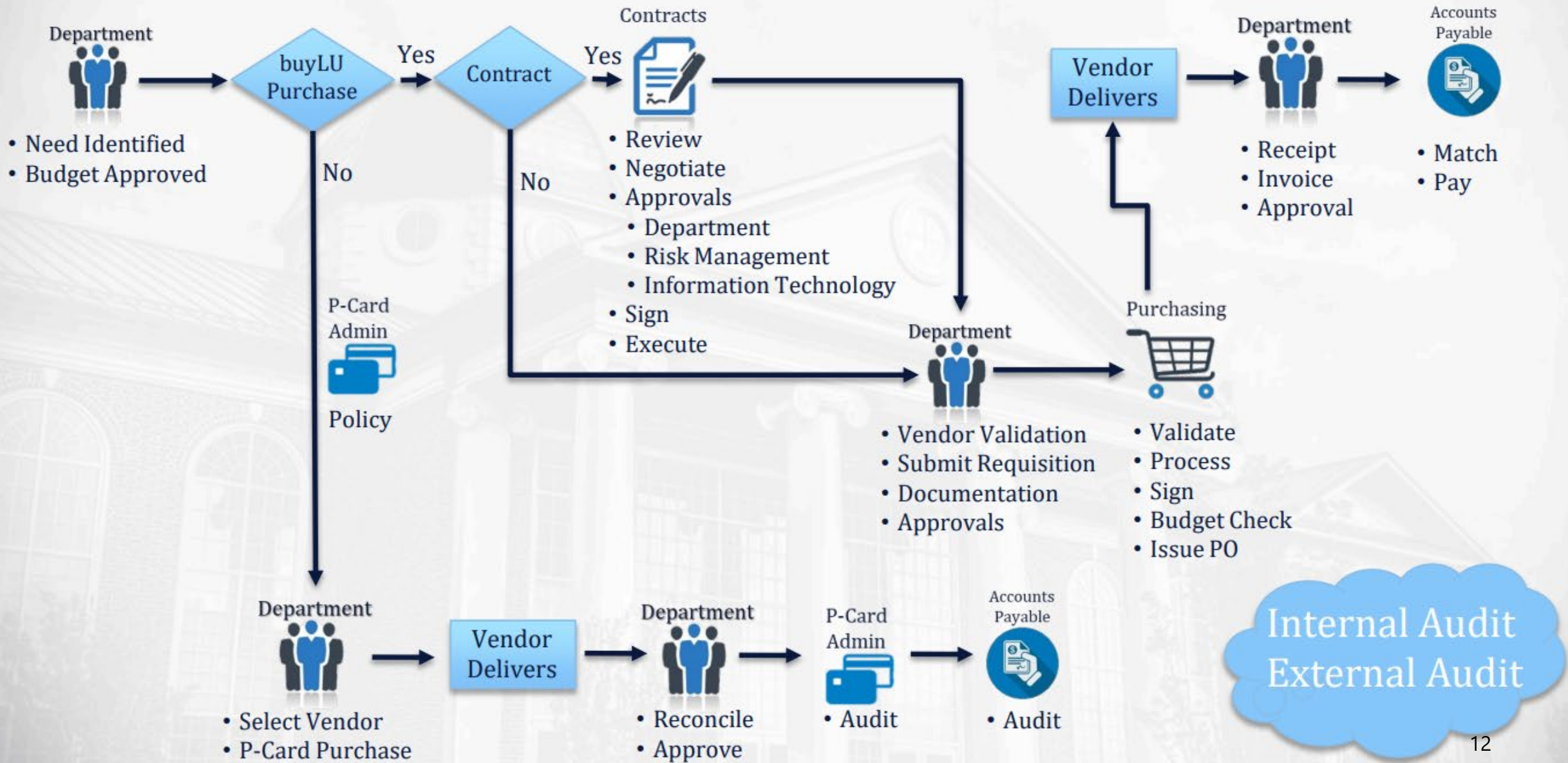


Invoicing

Typical processing time: 1-3 business days



Procure-to-Pay (P2P) Walk Through



Procurement Planning Checklist

PROCUREMENT PLANNING CHECKLIST

Use this checklist to keep track of all required documentation and forms required for your purchase.

- **Procurement Policy & Forms** are located on the Procurement & Payment Services website:
www.liberty.edu/finance-admin/procurement/policy-forms/
- **Got questions?** Contact Procurement by email or phone:
 - Email: procurement@liberty.edu
 - Phone: (434) 592-3012

SUPPLIER

- ☐ Check to see if supplier is registered in BuyLU:
Suppliers > Search for Supplier
- ☐ If you need a new supplier, request one by
going to BuyLU > Suppliers > Request >
Request New Supplier
- ☐ New supplier request requires current year
W-9 and COI (if required)

CONTRACT

- ☐ Ensure supplier is registered in BuyLU. If not,
submit a supplier request before submitting
contract request
- ☐ Submit contract request in BuyLU
- ☐ Quote
- ☐ Agreement (contract, terms & conditions, etc.)
 - ☐ If ICA, need ICA and ICA Questionnaire
- ☐ COI (if required)
- ☐ Supporting Documentation (as needed)
- ☐ Receive request from Contract Administrator to
submit requisition

CREATE A REQUISITION

- ☐ Determine whether purchase can be made via
a BuyLU catalog. If not offered via catalog,
submit non-catalog requisition
- ☐ Confirm supplier is active in BuyLU. If not,
Request New Supplier
- ☐ If a contract is involved, submit new contract
request in BuyLU. Wait for request from
Contract Administrator to submit requisition
- ☐ Submit non-catalog requisition
- ☐ Attach corresponding documentation (Quote
from vendor, contract, statement of work,
proposal, etc.)
- ☐ For requisitions valued at over \$10,000,
multiple formal bids are required. For
promotional products, multiple formal bids
are required, and the threshold is reduced to
\$1,000

RECEIVING

- ☐ Once item arrives, create receipt on PO in BuyLU

PAYMENT

- ☐ Instruct vendor to email invoices to Payment
Services at acctspay@liberty.edu