Step-by-Step Guide
Entering After-the-Fact Purchases into CU Marketplace

In This Guide

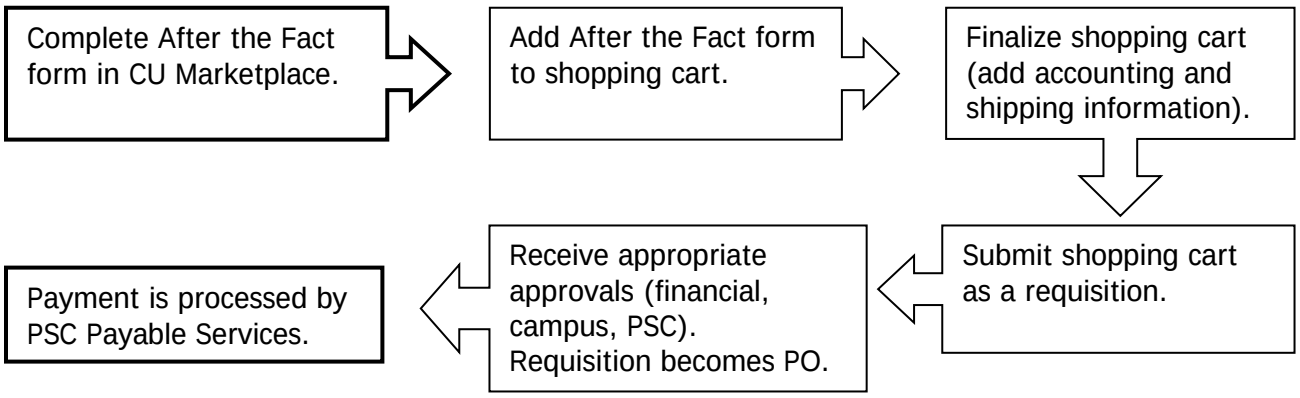
This guide discusses the After-the-Fact (ATF) purchase process. Topics covered are:

- ✓ ATF definition
- ✓ Procedure to enter ATFs
- ✓ ATF process cycle

What is an ATF purchase?

According to the PSC Procedural Statement After-the-Fact Purchases, an ATF purchase occurs when a department makes a purchase for more than $5,000 before issuance of a Purchase Order (PO). For example, authorizing a supplier to begin work before a PO is issued – even though the department has submitted a requisition – is an ATF. Similarly, obtaining goods or services on credit and subsequently submitting the invoice with a Payment Voucher/Authorization is an ATF unless it is a purchase specifically allowed to be paid by Payment Voucher/Authorization as set forth in the PSC Procedural Statement Payment Voucher/Authorization.

ATF Process Cycle in CU Marketplace



Procedure

Begin by accessing CU Marketplace via your campus portal. Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

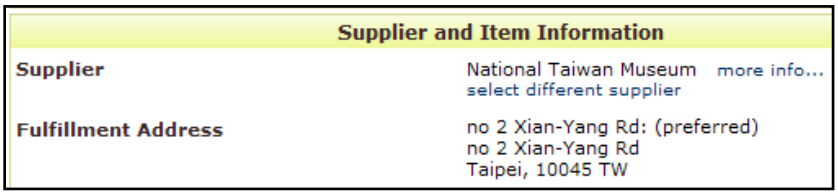
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Step #1: Enter After the Fact form in CU Marketplace

1. From the **CU Purchasing & Payment Forms** section of the CU Marketplace home page, select the **After the Fact Form**. The form will appear in a separate window.
2. Enter the **Supplier** or click the **supplier search** link. Select the appropriate supplier from the list of results.

> **Can't find your supplier?**
> A supplier must be set up in CU Marketplace before you can enter a form. Refer to the CU Supplier Portal web page for guidance.

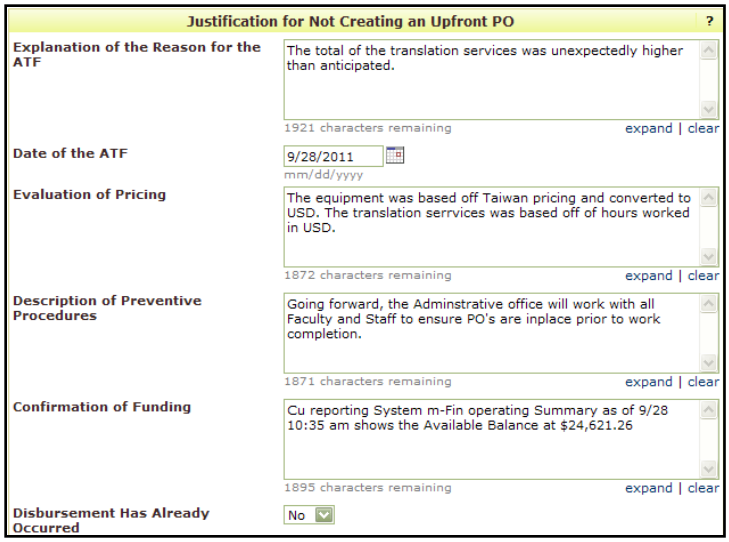
3. Verify that supplier information is correct. A **Fulfillment Address** specified by the supplier as preferred will default.



4. Enter the required item information, indicated by the boldfaced fields.
   a. If available, enter the **Catalog No**.
   b. Enter a detailed **Description**.
   c. Enter the **Quantity**.
   d. Enter the **Unit Price**.
   e. If appropriate, select a different **Packaging (UOM)** measurement.
   f. Select a **Commodity Code**.
   g. Click the **add attachments...** link to attach the invoice(s) and other pertinent documentation. The invoice **must** be attached or the purchase will not be approved by the PSC.

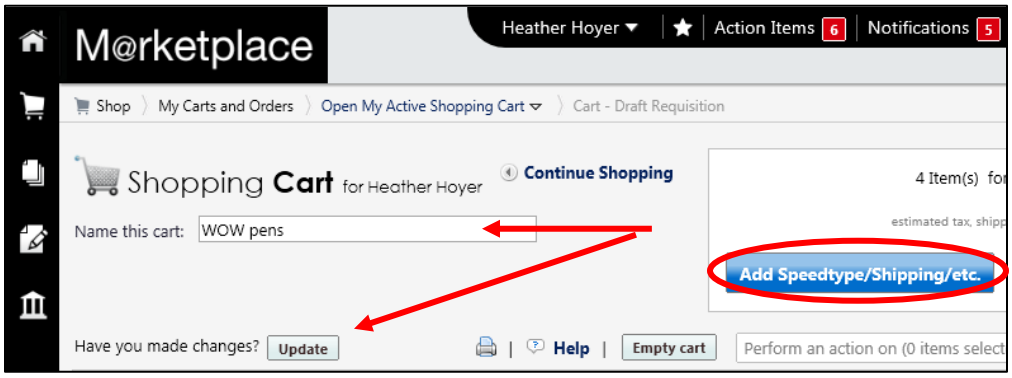


5. Enter the required **Justification for Not Creating an Upfront PO**.
   a. Enter an **Explanation of the Reason for the ATF**. Include a description of your department's internal controls and why controls did not prevent this situation from occurring. Also, include whether either party acted in bad faith or in a fraudulent manner.
   b. Enter the **Date of the ATF**.
   c. Provide an **Evaluation of Pricing** that assesses whether the prices or rates and fair and reasonable and the basis for that conclusion.
   d. Provide a **Description of Preventive Procedures** which includes steps that are planned to prevent this situation from occurring again. Also, if similar violations have occurred in the past, explain why prior preventative actions did not work.
   e. Attest that your department has the available resources to pay for this ATF in the **Confirmation of Funding** section.
   f. Use the **Disbursement Has Already Occurred** dropdown menu to select whether or not payment has been made to the supplier.



Step #2: Add form to your shopping cart

1. Use the **Available Actions** dropdown menu located at the top of page and select *Add and go to Cart*; click the **Go** button.
2. We recommend that you enter a unique shopping cart **Name** to easily identify or search for your shopping cart. If you do, click the **Update** button to save your shopping cart's new name.



Step #3: Finalize shopping cart

1. Click the **Add Speedtype / Shipping / etc.** button located in the upper right corner.

2. Navigation tabs appear at the top of the page and the error icon  highlights where your attention is needed. You can click on the tab to navigate to the section and provide information.



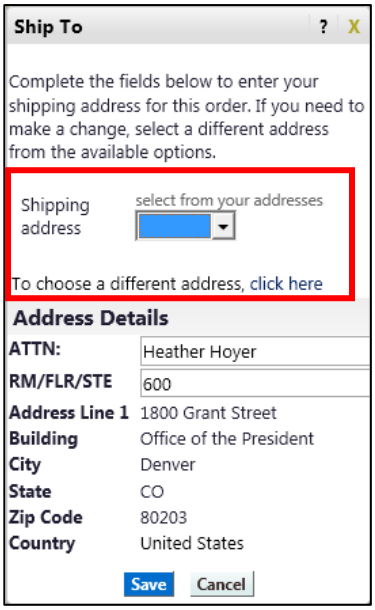
An error message also displays next to the field missing required information.

SHIPPING INFORMATION

If you have set a Ship To default in your profile, you only need to come here if you want to change your default shipping address for this SPO.

3. Click the **Shipping** tab.
4. Click the **edit** button to the right of the **Ship To** field.
5. Use the dropdown to select from addresses in your profile.

   Or, search for a different shipping address by clicking the **click here** link. Then, click the **select from org addresses** link and enter part of your address in the **Nickname / Address Text** field. Select the appropriate address from the resulting list.



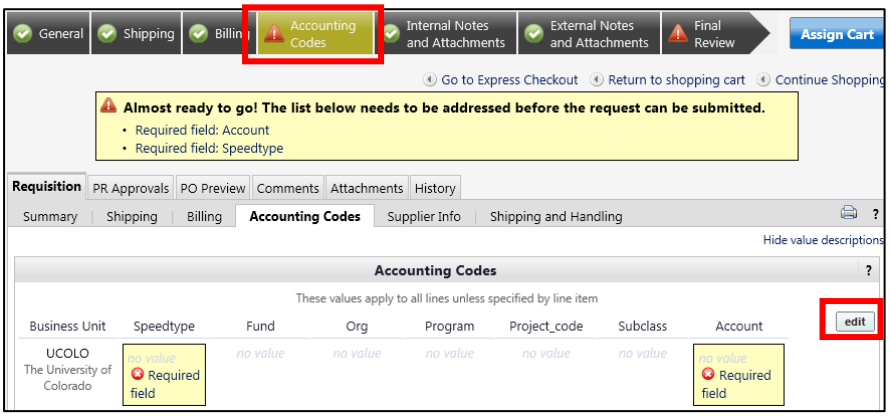
6. Enter the attention (**ATTN**) and room/floor/suite (**RM / FL / STE**) information and click the **Save** button.

Due to space limitations on the supplier's side, enter the **ATTN** and **RM/FL/STE** information as concisely as possible.

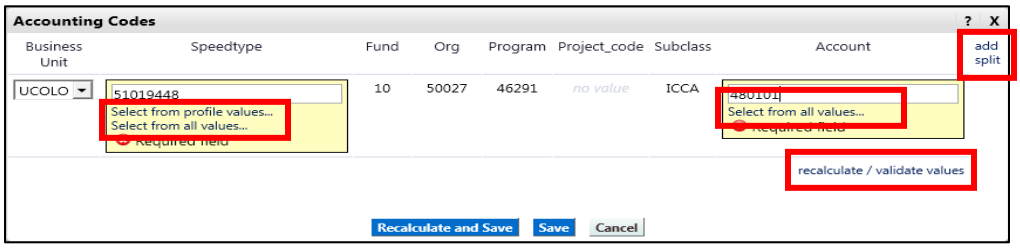
These fields can be used to enter other pertinent delivery information but keep in mind that the field truncates differently for different suppliers. Be brief!

ACCOUNTING INFORMATION

7. Click the **Accounting Codes** tab.
8. Click on the **Required field** link or the **edit** button to enter or search for the **SpeedType** and **Account**.
9. Enter the appropriate SpeedType using one of the following methods:

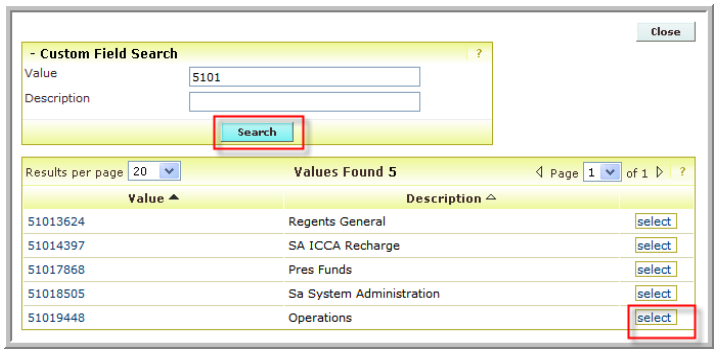


- If you have set your SpeedType Profile, click the **Select from profile values** link to access your SpeedType list.
- Type the **SpeedType** and click the **recalculate / validate values** link to return the corresponding Fund, Org, Program or Project value values.



- If needed, click the **Select from all values….** link to search for the SpeedType using the **Custom Field Search**.

  You can search by all or part of the SpeedType number (value) or description.



10. Type the **Account**, or click the **Select from all values….** link to search for the account using the **Custom Field Search**.
11. Click the **Save** button.

12. Click the **Internal Notes and Attachments** tab, if needed, to add notes to someone other than the supplier, such as the PSC purchasing agent or your financial approver.

13. Click the **Final Review** tab to complete your review. If needed, click the **edit** button to make additional updates.

Step #4: Submit shopping cart as a requisition

(You must have Requestor access in order to perform this step.)

1. Click the **Submit Order** button located in the upper right corner.
2. A congratulatory message will appear, along with a summary of your requisition.

   CU Marketplace will send an email notification to the Approver(s).

Step #5: Receive appropriate approvals

After the Requestor submits your shopping cart as a requisition, CU Marketplace routes your requisition for financial approval. Financial approval is given by an individual with a fiscal role on the SpeedType (except Officer) who is also a CU Marketplace Approver.

After financial approval is obtained, CU Marketplace routes your requisition to the appropriate campus approver, and then to the PSC, for approval. Once approved by the PSC, your requisition will convert into a PO. (Your PO is **not** communicated to the supplier.) The Requestor will receive an email notification from CU Marketplace.

Step #6: Payment processed

Once your requisition is converted into a PO, the invoice is sent to PSC Payable Services for payment processing. An email notification is sent to the Requestor once the invoice is entered as a voucher into CU Marketplace. You can then review the voucher online.