New PAW Workflow & Best Procure-to-Pay Practices

- PO Change Orders
- New Procurement Workflow
- Software & Cloud Services
- Accounts Payable & PAW

Presented by staff from Procurement, Accounts Payable, and Division of Information Technology

Welcome and Thank you for Joining Us Today

Please Mute Yourself

This presentation will be recorded

Questions can be submitted in the Chat Box or asked at the end of the presentation

Slides will be provided via email

OUTLINE

01
Purchase Order Change Requests
Process modifications and updates to active purchase orders

02
New Procurement Request Workflow
Step-by-step path for initiating POs, contracts, and software/cloud services

03
Updating Profile
Keep department billing and delivery info accurate

04
Budget Checks and Planning
How to check contract spend and plan for the future

05
Signing Agreements
Who can sign what?

06
How to Add or Update Suppliers

Change Requests (Change Orders)

What is a change request?

- **Change of quantity**: Adjust the number of items ordered
- **Change of item cost**: Update pricing to match current rates
- **Change of item**: Substitute or replace specific line items

When to submit a request?

- **Item Substitution**: When a supplier substituted an ordered item
- **Legitimate Price Change**: When pricing adjustments are validated
- **Missing Line Item**: When a supplier missed a mandatory item on the quote

Current PAW Procurement Workflows

Punchout Orders

Standard catalog purchases completed directly through approved supplier portals

Non-Catalog Purchase

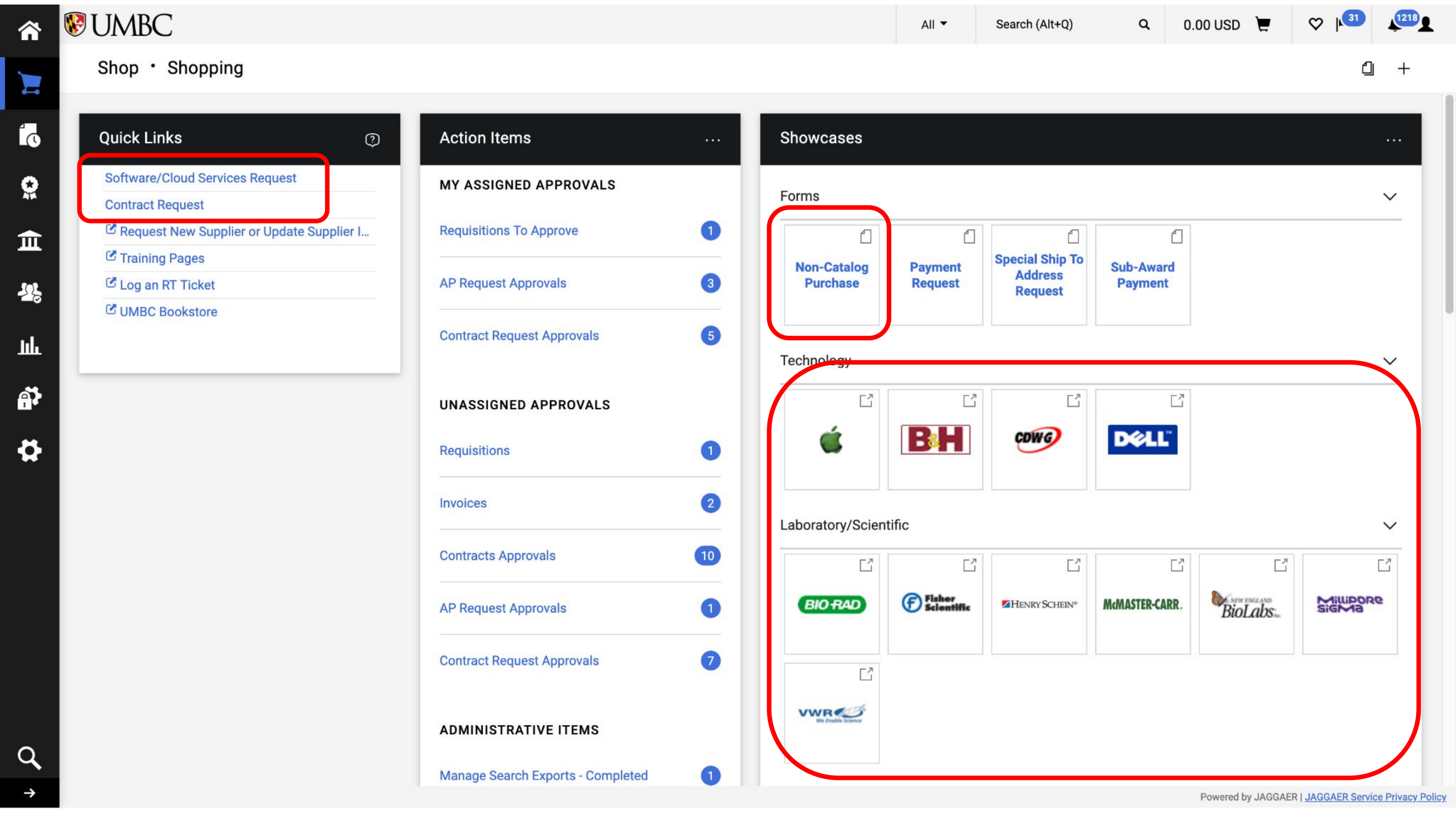
Requests for custom purchases from suppliers without an active digital catalog

Contract Request

Formal submissions to establish new agreements or amend existing university contracts

Software & Cloud Services

Specialized procurement workflow for software, subscriptions, and cloud-based systems


UMBC
All
Search (Alt+Q)
0.00 USD
31
1218
Shop • Shopping
Quick Links
Software/Cloud Services Request
Contract Request
Request New Supplier or Update Supplier I...
Training Pages
Log an RT Ticket
UMBC Bookstore
Action Items
MY ASSIGNED APPROVALS
Requisitions To Approve 1
AP Request Approvals 3
Contract Request Approvals 5
UNASSIGNED APPROVALS
Requisitions 1
Invoices 2
Contracts Approvals 10
AP Request Approvals 1
Contract Request Approvals 7
ADMINISTRATIVE ITEMS
Manage Search Exports - Completed 1
Showcases
Forms
Non-Catalog Purchase
Payment Request
Special Ship To Address Request
Sub-Award Payment
Technology
B&H
CDWG
DELL
Laboratory/Scientific
BIO-RAD
Fisher Scientific
HENRY SCHEIN
McMASTER-CARR
NEW ENGLAND BioLabs
MILLIPORE SIGMA
VWR
Powered by JAGGAER | JAGGAER Service Privacy Policy

New Workflow

Current State

Three Separate Links

- Non-Catalog Purchase
- Contract Request
- Software & Cloud Request

Future State

Procurement Request

All three request types are combined into one single entry point and unified workflow process

Important Change

The current separate links will no longer exist once active

Forms

Procurement Request

Procurement Request • Procurement Request

Save Progress | Next

1 Instructions | Suppliers | Attachments | Form Fields | 5 Review And Submit

Instructions

This request is to be used for non-catalog purchases, contract requests, and all software/cloud service requests.

Catalog shopping is accomplished when using a hosted or punchout catalog where UMBC specific items and prices are offered by UMBC contracted suppliers. Therefore, a non-catalog purchase refers to a purchase where hosted or punchout is not used.

This form may only be submitted if the supplier is already registered in the system. If the purchase is with a supplier that is not yet registered with the University, request a new supplier from the home page to register the supplier before finalizing the form.

Summary

Incomplete

Procurement Request

Created Date	9/6/2026
Form Number	1360261
Purpose	Procurement Request

← Procurement Request • Procurement Request

Save Progress | Previous | Next

✓ Instructions | 2 Suppliers | ✓ Attachments | ⚠ Form Fields | 5 Review And Submit

Suppliers

Selected Supplier

No Supplier selected

Search Registered Suppliers

Supplier

Zip Code | Within 5 Miles

Clear | Search

Summary

Incomplete

Procurement Request

Created Date	9/6/2026
Form Number	1360261
Purpose	Procurement Request

← Procurement Request • Procurement Request

Save Progress | Previous | Next

✓ Instructions | 2 Suppliers | ✓ Attachments | Form Fields | 5 Review And Submit

Suppliers

Selected Supplier

Supplier Name	Doing Business As	Fulfillment Centers
ROUGE FINE CATERING		DOMESTIC: SUITE F, 11110 PEPPER RD, HUNT VALLEY, Maryland 21031 United States

Search Registered Suppliers

Supplier

Zip Code Within 5 Miles

Clear Search

Summary

Incomplete

Procurement Request

Created Date	9/6/2026
Form Number	1360261
Purpose	Procurement Request

← Procurement Request • Procurement Request

Save Progress | Previous | Next

✓ Instructions ✓ Suppliers 3 Attachments Form Fields 5 Review And Submit

Attachments

Add Attachment

Empty List

No attachments have been added to this request

Summary

Incomplete

Procurement Request

Created Date	9/6/2026
Form Number	1360261
Purpose	Procurement Request

Attachments

Purchase Order (PO)

Required Attachments:

- Quote
- Order Form

Contract Request

Required Attachments:

- Order form or proposal
- Supplier agreement (including terms & conditions)

Software & Cloud

Required Attachments:

- All contract request docs
- HECVAT 4
- VPAT

Item Details

Enter details of the "non-catalog" procurement below. Please note that the total will not update until you save your progress.

"Unit Price" is the price per item/services. Unit of measure will be how the price was quoted. For example:

"$10/Box" - "Box" is the Unit of Measure, $10 is the "Unit Price". If buying 10 Boxes, the total amount of the quote would be $100

"Catalog No." will be the SKU provided in the quote. This field may be left blank if a SKU was not provided in the quote.

Item/Service

Unit Price ★ USD Quantity ★ Total (

Unit of Measure

Product Description ★

1000 characters remaining

Catalog No.

Commodity Code ★ – Edit

Have you attached the quote or any other required backup documentation? ★

Yes
No

Is this purchase for a sole source item or a sole source service that is greater than $25,000? ★

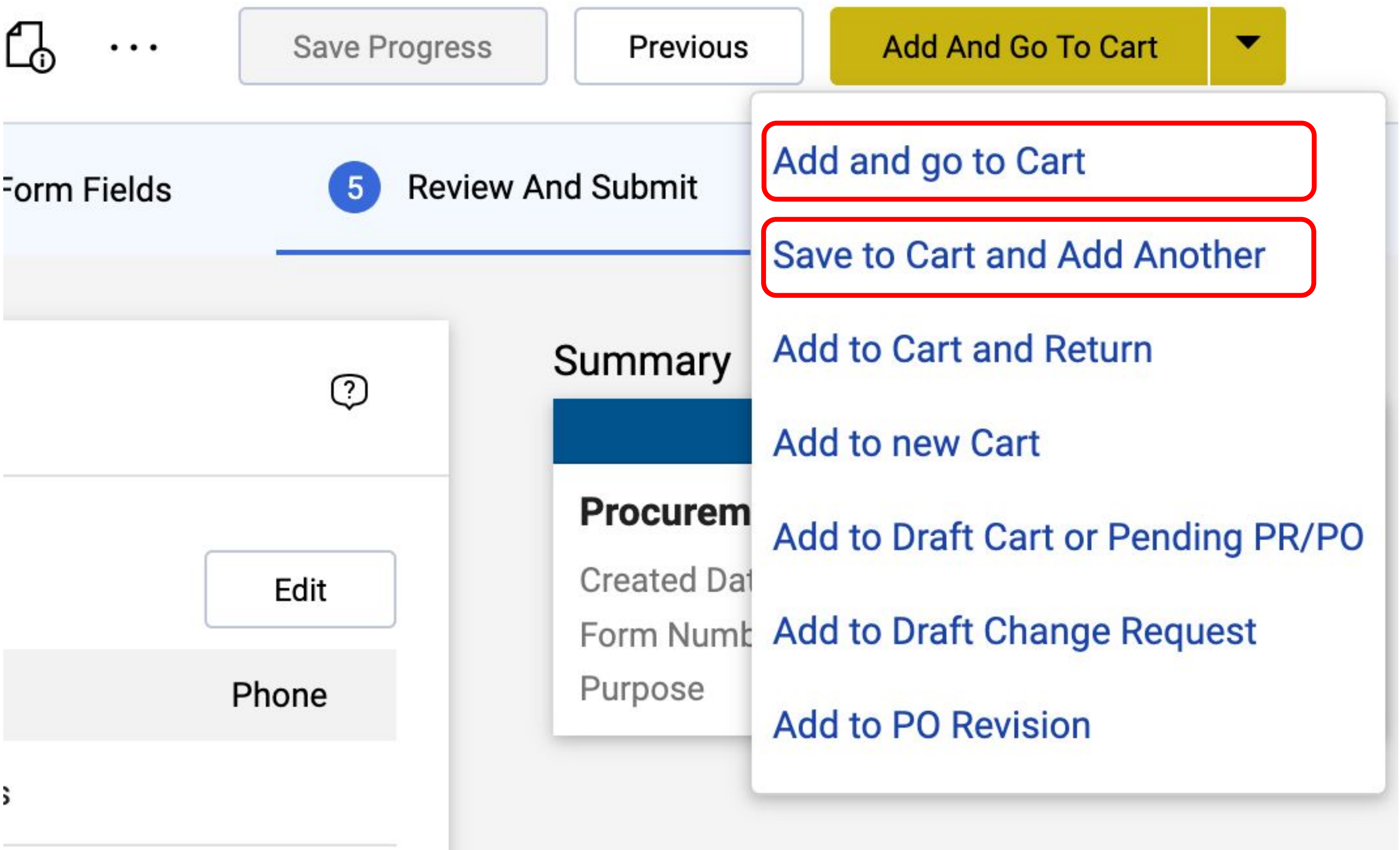
Yes
No

Have you already worked with someone in Procurement for this purchase? If so, please select the person you have worked with.

Ann Fusselbaugh
Beckie Gotsch
David Clurman
Teri Michel
Rosetta Butler
Nneka Miller

Will this procurement involve a contract? A contract would entail services provided over a set period of time and involve terms and conditions that must be agreed upon. ★ ○ Yes ○ No

Does this product involve software or cloud services? ★ ○ Yes ○ No



Save Progress
Previous
Add And Go To Cart
Form Fields
5
Review And Submit
Add and go to Cart
Save to Cart and Add Another
Add to Cart and Return
Add to new Cart
Add to Draft Cart or Pending PR/PO
Add to Draft Change Request
Add to PO Revision
Summary
Edit
Phone
Purpose

Home
Shop
Orders
Contracts
Accounts Payable
Suppliers
Reporting
Administer
Setup
Menu Search

UMBC TEST SITE

All | Search (Alt+Q) | 1,245.00 USD | 8

Shopping Cart • 4623543

Assign Cart | Proceed To Checkout

Go to: Non-Catalog Item | Favorites | Forms | Shop Browse: Suppliers | Categories | Contracts

Simple | Advanced

Search for products, suppliers, forms, part number, etc.

1 Item

Select All

ROUGE FINE CATERING · 1 Item · 1,245.00 USD

SUPPLIER DETAILS

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price
	Procurement Request					

ITEM DETAILS

Template Title: Procurement Request

Purpose: Procurement Request

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price
1	Food for Student Event		EA	1,245.00	Qty: 1	1,245.00

ITEM DETAILS

Summary

Details

For
David Clurman

Name
2026-09-06 DA66287 01

Total (1,245.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 1,245.00

Update Required Cart Information

01

Shipping Address

Specify and verify the correct delivery location for your order

02

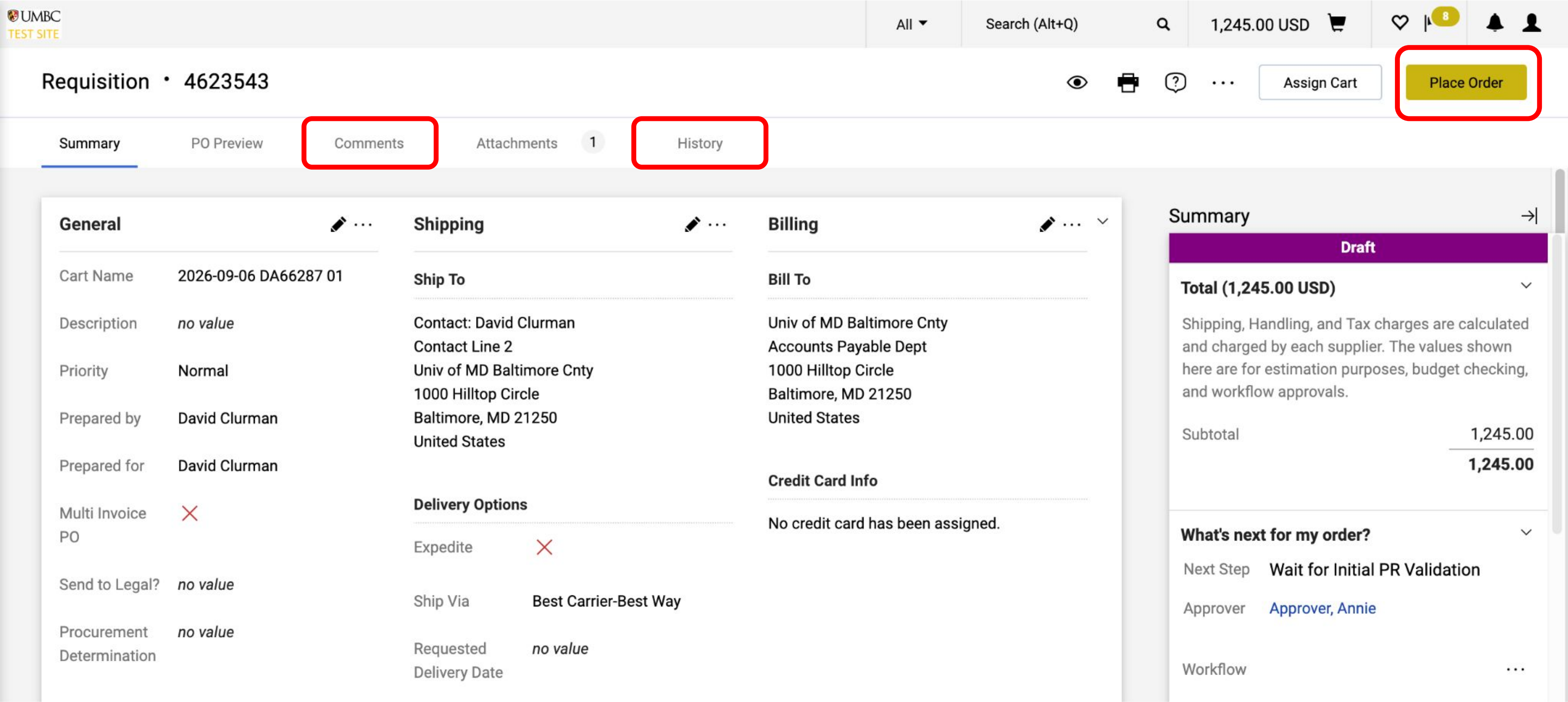
Chartstring Info

Input and review the appropriate financial accounts and funding codes

03

Submit for Approval

Perform a final verification of all details, then submit your completed cart


UMBC
TEST SITE
All
Search (Alt+Q)
1,245.00 USD
8
Requisition • 4623543
Assign Cart
Place Order
Summary
PO Preview
Comments
Attachments 1
History
General
Cart Name 2026-09-06 DA66287 01
Description no value
Priority Normal
Prepared by David Clurman
Prepared for David Clurman
Multi Invoice PO
Send to Legal? no value
Procurement Determination no value
Shipping
Ship To
Contact: David Clurman
Contact Line 2
Univ of MD Baltimore Cnty
1000 Hilltop Circle
Baltimore, MD 21250
United States
Delivery Options
Expedite
Ship Via Best Carrier-Best Way
Requested Delivery Date no value
Billing
Bill To
Univ of MD Baltimore Cnty
Accounts Payable Dept
1000 Hilltop Circle
Baltimore, MD 21250
United States
Credit Card Info
No credit card has been assigned.
Summary
Draft
Total (1,245.00 USD)
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Subtotal 1,245.00
1,245.00
What's next for my order?
Next Step Wait for Initial PR Validation
Approver Approver, Annie
Workflow

History

4/6/2026, 9:10:49 AM	[redacted]	Department Approval	Requisition assigned				
4/6/2026, 9:09:54 AM	System	Initial PR Validation	Message transmission to external system was successful.				
4/6/2026, 9:09:54 AM	System	Wait for Initial PR Validation	Requisition budget check passed				Requisition 214431687, All Chartfield Combinations Valid
4/6/2026, 9:09:50 AM	[redacted]		Requisition submitted				
4/6/2026, 9:09:48 AM	[redacted]		Requisition modified	Prog Fin	011	021	
4/5/2026, 9:10:45 PM	System	Initial PR Validation	Message transmission to external system was successful.				
4/5/2026, 9:10:45 PM	System		Requisition returned		System	[redacted]	Invalid Chart Combination
4/5/2026, 9:10:41 PM	[redacted]		Requisition submitted				

Will this procurement involve a contract? A contract would entail services provided over a set period of time and involve terms and conditions that must be agreed upon. ★ ◯ Yes ◯ No

Does this product involve software or cloud services? ★ ◯ Yes ◯ No

For Contracts

You will need to enter:

Start Date

The anticipated start date for the contract

End Date

The end date (whether it is a set date or a term date)

Renewal Terms

If there are any renewal terms; if so, how many are they and what is the length

Contract Information

Provide both the start and end dates for this contract.

Is this an amendment to an existing contract? ★ ◉ Yes ○ No

What is the contract number?

Anticipated Start Date ★

mm/dd/yyyy

End Date ★

○ Expires on

○ Term

Does this contract have any renewal terms? ★

Yes

Renewal Term (list years and/or months) ★

Number of renewal terms ★

Provide any additional clarifications for the value, such as per license or subscription length.

2000 characters remaining

For Software/Cloud Services - Part 1

You will need to enter:

Supplier Info

- Supplier name
- Contact information

Service Details

- Purpose & description
- Replacement status
- New request or renewal

Billing & Admin

- Payment method (PO, P-card, or Contract)
- Additional contacts to be copied

Software Product Information

Product Name ★

Contact Name for Supplier ★

Email for Supplier Contact ★

Contact Phone Number for Supplier

Supplier Website ★

What will this software/cloud service do? ★ ⓘ

2000 characters remaining

Is this replacing software currently in use? ★

◯ Yes ◯ No

Purchase Type ★ ⓘ

◉ New

◯ Renewal

Please note that if you wish to renew this software it will need to go through this review process again. ★ ⓘ

☐ Acknowledged

How will this software be paid? ★

I am submitting this software/cloud services request on behalf of someone. ★

◯ Yes ◯ No

Is there anyone else who should be included on communication relating to this software? If so, include their name and email.

For Software/Cloud Services - Part 2

You will need to enter:

Data & Storage

- Storage location (UMBC, Cloud)
- Shared data & PII details

User & Media

- Audio/video of community
- UMBC user estimates by group (students, faculty, staff)

Access & SSO

- External user estimates
- SSO integration details

Please answer as many of these questions as possible to assist in the security review of the software.

How long do you anticipate using the software? ★

Provide the name and email address for the Software firm's security contact, if known.

Is the application's data being stored on premise at UMBC or in the cloud? ★

- UMBC
- Cloud
- Unsure

Describe any data that will be sent from UMBC to the Software firm. Be sure to note any student, Personal Identifiable Information, or health-related data.* ★

2000 characters remaining

Will there be video or audio of members of the UMBC community contained in the application or generated by the application? ★

- Yes
- No

How many employees (faculty and staff) will be using this software? ★

How often will the employees (faculty and staff) use this software? ★

How many students (graduate and undergraduate) will be using this software? ★

How many external users will be using this software? ★

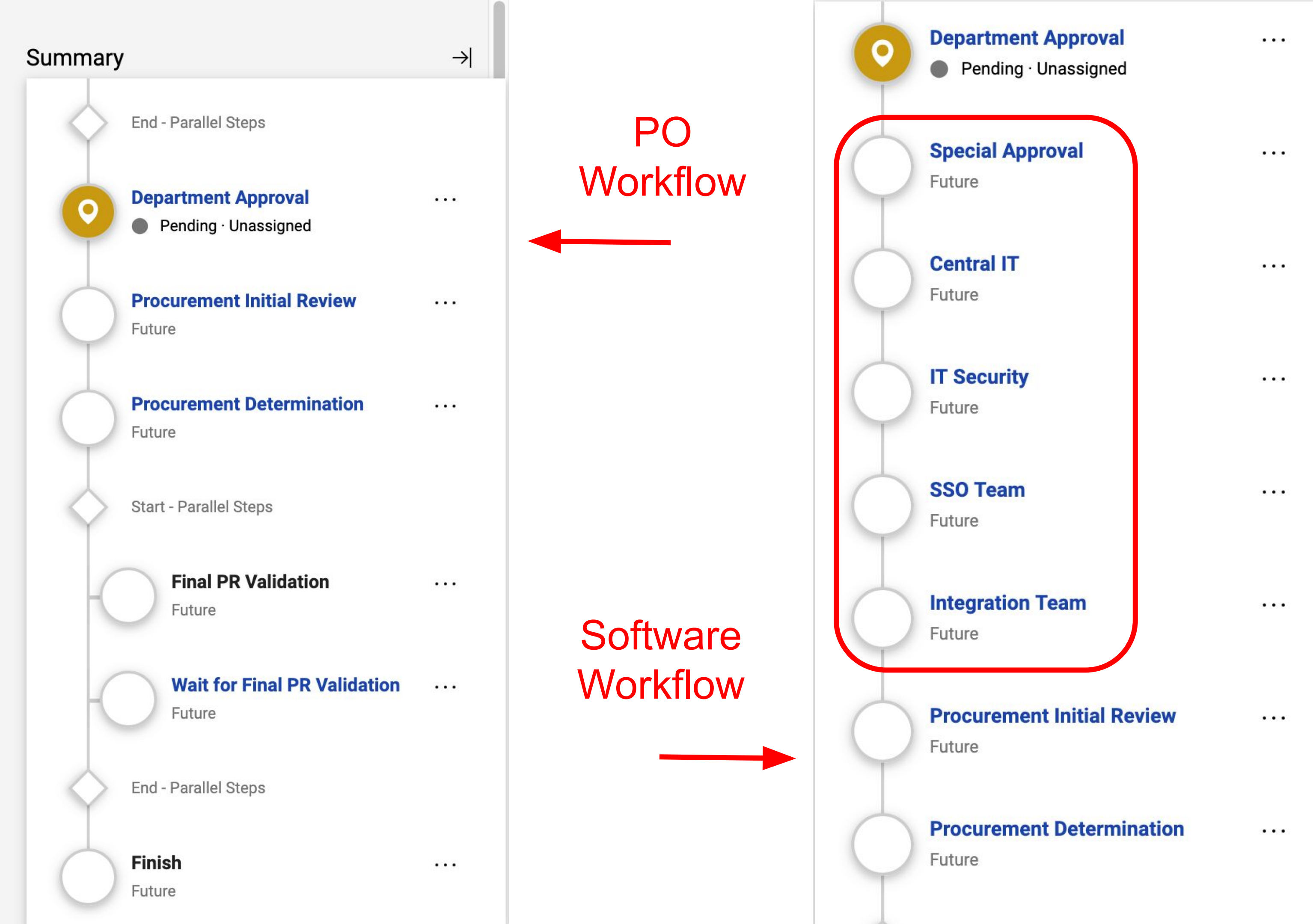
Does this software support integration with UMBC's Single Sign On (SSO) via SAML or CAS? ★

Provide any additional information that would be useful in the SSO review of this product.

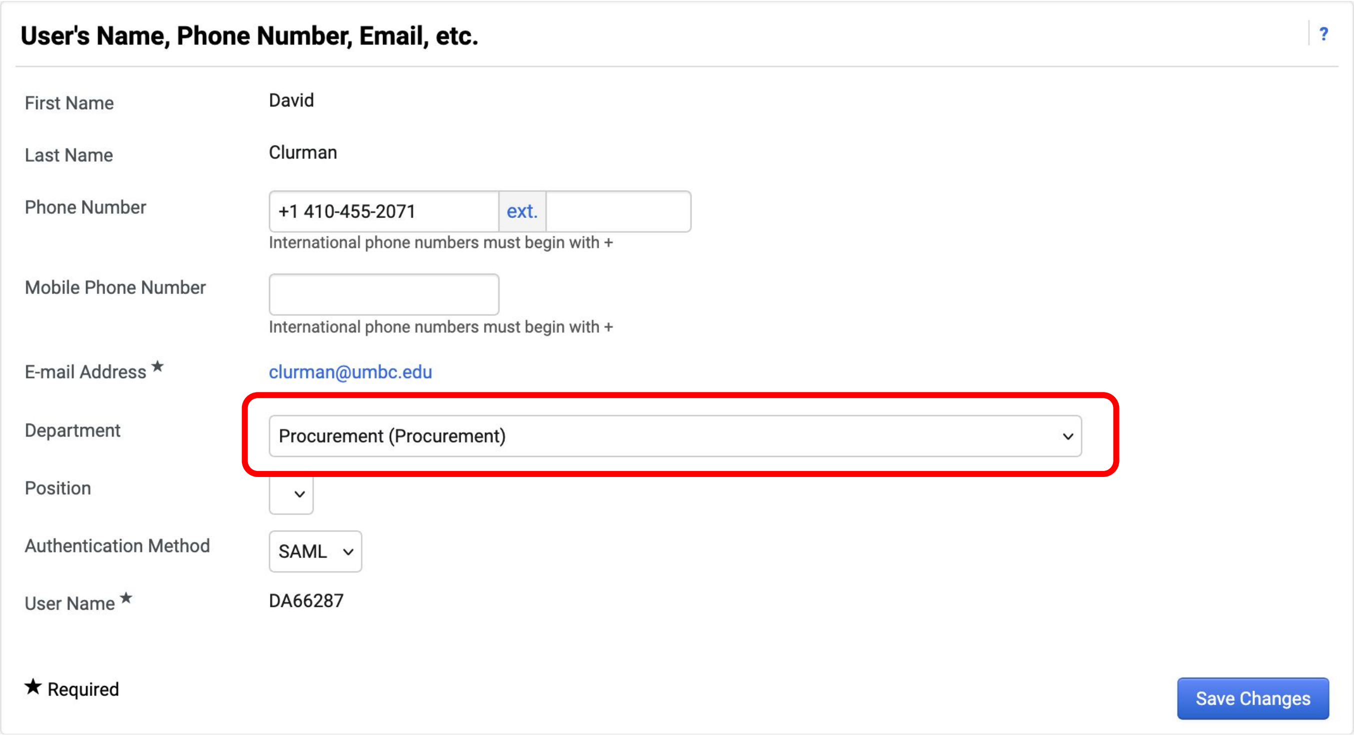
2000 characters remaining

I acknowledge that if full contact information is not provided above, there may be a delay in the review as the information will need to be researched during the review process.* ★

Acknowledged


Summary
End - Parallel Steps
Department Approval
Pending · Unassigned
Procurement Initial Review
Future
Procurement Determination
Future
Start - Parallel Steps
Final PR Validation
Future
Wait for Final PR Validation
Future
End - Parallel Steps
Finish
Future
PO Workflow
Software Workflow
Department Approval
Pending · Unassigned
Special Approval
Future
Central IT
Future
IT Security
Future
SSO Team
Future
Integration Team
Future
Procurement Initial Review
Future
Procurement Determination
Future

Updating Your Profile in PAW



User's Name, Phone Number, Email, etc.

?

First Name: David

Last Name: Clurman

Phone Number: +1 410-455-2071 ext.

International phone numbers must begin with +

Mobile Phone Number:

International phone numbers must begin with +

E-mail Address ★: clurman@umbc.edu

Department: Procurement (Procurement)

Position:

Authentication Method: SAML

User Name ★: DA66287

★ Required

Save Changes

UMBC

Checking Contract Spend

$25,000+
Will need additional quotes

$200,000+
Will need to do a formal solicitation

[redacted]

Type:	Consulting
2nd Party:	[redacted]
Dates:	7/1/2026 - 6/30/2027
Version:	Renewal 0, Amendment 0
Contract Request:	22942953

Lifetime Spend (USD)

Contract:	**23,375.00**
PR:	**0.00**
PO:	**0.00**
Invoice:	**23,375.00**

Details...

View Contract

Budget Planning

Actual Spend by Version (USD)

Version Numbers	Status		Contract Spend	PR Spend	PO Spend	Invoice Spend	
Renewal 0, Amendment 0 This Version	Executed: In Effect		23,375.00 (0% of 0.00)	0.00 (0% of 0.00)	0.00 (0% of 0.00)	23,375.00 (0% of 0.00)	Adjust

Budget Planning

Created Date: All | Quick search | Add Filter | Clear All Filters

[redacted] × Invoice Status: Complete,Pendi... ×

1-3 of 3 Results

200 Per Page

...	Invoice Number	Supplier Invoice Number(s)	Supplier	PO Number	Invoice Status	Created Date/ Time	Due Date	Discount Date	Discount Amount	Submitted Date	Invoice Source	Invoice Type	Pay Status	Total Amount
...	JI213267	1127	[redacted]		Complete	9/1/2026 7:17:33 AM	9/1/2026	9/30/2026	0.00 USD	9/1/2026 7:18:29 AM	Manual	Non-PO Invoice	Payable	5,500.00 USD
...	JI210501	1124			Complete	8/3/2026 10:19:25 AM	8/3/2026	9/2/2026	0.00 USD	8/3/2026 10:20:16 AM	Manual	Non-PO Invoice	Paid	10,862.50 USD
...	JI207864	1119			Complete	7/1/2026 9:53:19 AM	7/1/2026	7/31/2026	0.00 USD	7/1/2026 9:54:48 AM	Manual	Non-PO Invoice	Paid	7,012.50 USD

Signatures

Having responsibility for a department, managing a budget, or being the person who requested the purchase does **not give someone authority to enter into an agreement on behalf of the University**

Who Can Sign?

UMBC Signature policy states exactly who can sign agreements

Staff may **only** sign for specific exceptions: art proofs, BEOs, and internal space reservations

Supplier Requests

“I just need your signature right here...”

If a supplier says this, that is your immediate cue to **stop** and send the document straight to Procurement

Digital Agreements

A signature isn't always handwritten anymore.

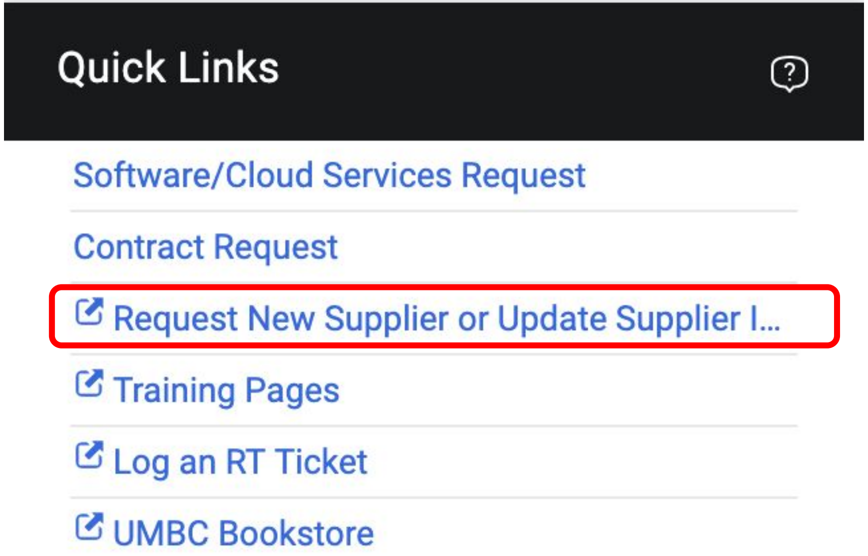
Clicking **“I Accept”** or **“I Agree”** online creates binding legal obligations.

When in doubt, ask us first!

Procurement & Strategic Sourcing

Supplier Forms

Adding Suppliers or Updating Supplier Information



Adding Suppliers or Updating Supplier Information

Supplier Information Sheet

Ensure that you enter Supplier Contact information correctly:

- **They will only be able to access the form through their email.**

	*Name	*Email
UMBC_Contact	David Clurman	clurman@umbc.edu
Supplier_Contact	Name	Email

Firm Name

Firm Name

*Supplier-Type

- ✓ --choose--
- Domestic (with US Tax Id or SSN)
- Foreign Individual
- Foreign Corporation

Next Pressing the Next

* = Required field.

UMBC

Supplier Forms & Privacy

What are the forms for?

- **Supplier Information:** Used to obtain new or existing supplier info, allowing UMBC (The State) to issue payment
- **Mandatory Completion:** Required for any individual or company receiving payment from UMBC (The State)

What about privacy?

- **Restricted Access:** Only a select few authorized individuals can see or access the completed forms
- **Secure Storage:** All forms are stored safely in a secure BOX folder and processed via DocuSign

Domestic Form

Who is this form for?

This form is for anyone with a domestic address (US and US territories) and a US Social Security Number (SSN).

The Domestic Form DocuSign Package Consists of:

01

Instructions

Initial guidelines and steps to complete the domestic package successfully

02

2 Fillable Forms

- **Supplier Info Sheet:** Required details
- **W-9 Form:** Taxpayer identification

03

W-9 Instructions

Official IRS guidance and instructions for completing the W-9 form properly

Domestic Form

The following key information is collected on this form:

01

Contact & Addresses

- Order address
- Remittance address
- Phone & Email

02

Tax & Classification

- EIN or SSN
- Government Business Classification
- Minority Business Enterprise (MBE) or Certified Small Business (CSB) (formerly SBR)

03

Disclosures

- Conflict of interest declarations

Foreign Corporation Form

Who is this form for?

This form is for any corporation that does not have an address in the US and/or those without an EIN registered in the US.

The Foreign Form DocuSign Package Consists of:

01

Instructions

Initial guidelines and steps to complete the foreign package successfully

02

2 Fillable Forms

- **Supplier Info Sheet:** Required details
- **W-8BEN-E Form:** Taxpayer identification

A Note

Unfortunately, the system **will not** allow for combining foreign and domestic address; suppliers can either have a Domestic address or a Foreign one

Foreign Individual Form

Who is this form for?

This form is for any individual that does not have an address in the US and/or those without a SSN.

The Foreign Form DocuSign Package Consists of:

01

Instructions

Initial guidelines and steps to complete the foreign package successfully

02

2 Fillable Forms

- **Supplier Info Sheet:** Required details
- **W-8BEN Form:** Taxpayer identification

A Note

Unfortunately, the system **will not** allow for combining foreign and domestic address; suppliers can either have a Domestic address or a Foreign one

Supplier Form Workflow

01

Form is initiated by UMBC Sponsor via DocuSign

02

Form is sent to the supplier via Email

03

Supplier completes and submits the form

04

A completed copy of the form is sent to Sponsor and Procurement

05

Form is manually reviewed for compliance

06

Form is manually entered into the system

Common Reasons for Returned Forms

Form & Rules

- **Incorrect Form:** The wrong form template was selected and sent to the supplier
- **Instructions Ignored:** Prior instructions preceding the form were not followed
- **Inconsistent Names:** Names provided on different sections or forms do not match

Tax Identifiers

- **SSN / EIN Errors:** Missing or extra digits in the taxpayer identification fields

Incorrect tax information leads to issues at the State level and payment can be withheld

Address Details

- **Incomplete Address:** Unit, Apartment, or Suite numbers must be explicitly included on both forms

- **Remittance Address:** The State of Maryland strictly requires the remittance address on the W-9, or payments will be withheld

Common Questions

Government Forms

Why are the government forms (W-9/W8s) automatically attached?

Simply, they were not being filled out completely or attached at all

Supplier Forms

Why is there a separate form for suppliers only?

In short, many suppliers desire to do business with UMBC, but without a sponsor, the process of entering those suppliers into the system would waste time and resources

These forms are stored in a different folder and do not notify Procurement that they are completed

Change Policy

Why do suppliers need to fill out a new supplier form for all changes?

The government forms W-9/W8s need to match what we have on record

Also, many times, more than one item has changed and all information should agree.

Common Questions

Submission Method

Will you accept forms via email?

Suppliers are encouraged to submit forms via DocuSign for file management and privacy concerns.

However, it is understood that some firms do not allow DocuSign; these requests will be handled on a ***case by case basis.***

Format & Legibility

Will you accept handwritten forms?

Handwritten forms will be accepted on a ***case by case basis*** as legibility is an issue.

However, we recognize that access to a computer or smartphone to complete the form is a privilege.

Supplier Follow-up

My supplier has not returned the form?

If your supplier has not returned the form, you will need to communicate with them directly, as Procurement cannot see or track DocuSign forms sponsored by anyone else.

Common Questions

Sponsor & Supplier Communication

WHY DOES PROCUREMENT ASK FOR THIS?

The Sponsor generally has had prior contact with the supplier. Direct communication ensures continuity, as the sponsor will be the one working directly with the supplier.

Form Processing Timeline

HOW LONG DOES IT TAKE TO ENTER?

Although this is a manual process, forms are generally entered the **same business day** if completed correctly and received **before 4:00 PM**.

Need help? If your DocuSign form is received and not added to the system within three (3) business days, please submit an RT for assistance.

UMBC

Helpful Tips!

New Supplier Guide

Access the latest guide by following these steps on the website:

1. Visit www.procurement.umbc.edu
2. Go to **Resources for UMBC Staff**
3. Click **Training, Guides, Forms, and FAQs**
4. Open New Supplier Guide

Need Assistance?

Our procurement team is here to help with any additional questions

Submit an RT

TIME FOR A 5-MINUTE BREAK!

REFRESH
Grab a drink

RECHARGE
Stretch your legs

RESET
Give your brain a break

CATCH UP
Check that message

5:00

We'll be back in 5 minutes!

UMBC

THANK YOU FOR YOUR
commitment to UMBC! ♡