Procurement and Payment Services

- Procurement and Payment Services of the Emory University Finance Division manages:
  - Payments to individuals (non-employees)
  - Payments to companies
  - Payments to study participants (with the Cash Management staff of the Controller’s Office)
  - Purchases via Emory Express or corporate cards
  - Vendor maintenance, supplier diversity, preferred vendors, and contract administration
Procurement and Payment Services

Welcome to Procure & Pay

Our web pages are designed to make it easy for you to find the buying and paying information you need. We've made the pages simple, clean and easy to navigate. Also, check the QUICK LINKS on the upper right side of all PROCUREMENT & PAY web pages for quick access to our most popular pages.

Procurement Services — "Where and How to Buy" Goods and Services at Emory

Our staff of professional buyers in Procurement Services manages the buying of goods and services for the University. We secure the best price, quality and service and provide innovative approaches to streamlining the process especially for frequent, university-wide purchases. Check our complete contract listing in Emory Express for savings opportunities. Also, look at our web page Buying Green for environmentally-friendly initiatives. Above all, consult with our professional procurement staff for your special needs and high-dollar purchases.

The Buying in the Marketplace web page guides you "Where and How to Buy", your goods and services at Emory and provides a Commodity Index listing for your convenience.

Payment Services — "How to Pay" Suppliers for goods/services as "How to Pay" individuals

Our Payment Services staff is responsible for the payment of goods and services to suppliers as well as facilitating reimbursements to individuals for costs incurred as part of the University business. With an emphasis on maintaining controls, we provide innovative approaches to streamlining the payment process especially for frequent, university-wide purchases. For invoice resolution, reimbursement advice, Compass Expense Reports and other payment-related questions, contact our Procure & Pay Customer Care Team at 404.727.5400.

For detailed information on how to process your payment transactions, refer to the How to Pay - Payment Services page as it provides you information on how to process all your payment transactions.
Payment and Procurement Staff

Our Customer Care Team can answer all your questions about Payments, Emory Express, and more...

404.727.5430
e-market@emory.edu

Emory Express

Supplier Announcements and Promotions
Take Our Poll - Preferred Scientific Supplier
View Survey Results
Compass Expense Reports and Payment Requests

Sparkfly

- EMPLOYEE DISCOUNTS -
Contact Information

• Primary Contact Information
  – (404) 727-5400 is the helpline
  – Or e-mail: e-market@emory.edu

• Please do not e-mail or call specific staff members of Emory University Accounts Payable unless you are directed to do so by the helpline staff @ (404)727-5400

• RSPH Business Services staff are also happy to assist
RSPH Business Services

• Contact RSPH Business Services if you would like one-on-one assistance:

• We are located on the 8th floor of the Grace Crum Rollins Bldg
  – Leola Morgan 712-1324; lpmorga@emory.edu
  – Allyson Frye 727-3392; aafrye@emory.edu
  – Linda Longwell 727-9761; trlll@emory.edu
  – Carolynn Miller 712-8379; cmmille@emory.edu
Emory Policy

• Employees authorized to request purchases or request payments must abide by RSPH policies and procedures and Emory University policies and procedures.

• Failure to do so may result in disciplinary action, up to an including termination of employment.

• Emory may also collect any amounts for improper purchases or payments and may also pursue legal action if necessary.
Business Purpose of Purchases and Payments

• All transactions resulting in purchases or payments to individuals or organizations require a detailed BUSINESS PURPOSE – this is a standard business practice that allows RSPH to meet audit standards.

• A business purpose contains more than a description of the services or the items being requested for purchase or reimbursement, it includes the business purpose and explanation for the expense. For instance, “supplies” is not a business purpose, it is a statement of what was purchased, but not why (for what purpose). Include the date(s) as well.
How to Pay

- P-Card – use for incidentals, groceries, business meals, boxed lunches, catering, registrations, licenses, van rentals, subscriptions, and monthly services: coffee or water service, storage, and business phones (limit=$1,499.00)
- Emory Express - all other purchases
- Individuals (non-employees) – Compass Accounts Payable
- Companies – pay via Emory Express
- Wire Payments – USD in Emory Express
- International Currency Wire Payments through form on Procure and Pay Forms Page:
- [https://www.finance.emory.edu/home/Procure%20and%20Pay/how_to_pay_in_the_marketplace/NewWire%202010.pdf](https://www.finance.emory.edu/home/Procure%20and%20Pay/how_to_pay_in_the_marketplace/NewWire%202010.pdf)
How to Pay

• Travel
  – T-Card – process payment to vendors via Compass Travel and Expense module
  – Personal Card – request reimbursement via Compass Travel and Expense module
  – Airfare – direct bill via one of the 3 required travel agencies:
How to Pay

• If you are unsure of the correct payment method, please call the helpline at (404) 727-5400 or ask RSPH Business Services staff BEFORE making the purchase.

• Some items are not reimbursable and should not be purchased with sponsored program or university funds:
Emory Express

- Emory Express software facilitates multiple functions:
  - Buying in the Marketplace
  - All purchases not appropriate or possible on the P-Card (except travel expenses to be placed on T-Card)
  - All purchases of restricted items
  - Payments to Companies
  - Subcontract Payments
  - Wire Payments in US Currency
Emory Express

- All Emory Express purchases or payments charged to budget smartkeys managed by the School of Public Health will require these approvals before payments will be issued or orders will be processed:
  - PI and Research Financial Analyst approvals for sponsored program expenses, then RSPH Business Services approvals
  - Dept Chair then RSPH Business Services approvals for all department purchases
Training Opportunities

We offer a variety of educational opportunities to help you develop your procurement knowledge and skills. Select your needs from the following options to help you in your everyday work.

**Training session for Emory Express**

In the Emory Express session you will learn:

- How to order goods and services
- Receive goods and services on-line
- Use the different types of ordering forms, and
- Process the invoice attached form

---

Emory Express

Supplier Announcements and Promotions

Take Our Poll - Preferred Scientific Supplier

View Survey Results

Compass Expense Reports and Payment Requests
Training - Demo's and Manuals

Registration for Emory Express Training

Are you the one that will be entering the requisitions/orders for goods and services? If so, you will need the complete two-hour hands-on training session for Emory Express. To register, follow these directions for your training and access to Emory Express:

1. Print this form, Registration Form for Online Access, get approval for your access to Emory Express;
2. Complete the form and have your Department Administrator approve (sign) for access to Emory Express;
3. Register (sign-up) for one of the Emory Express training sessions. Click here to register;
4. Bring your completed Registration Form for Online Access to the class.

(Note: This form is required with the Department Administrator’s signature when you go to the training session.)

Emory Express Approver - Are you an Approver of Requisitions and need access to approve requisitions?

If you are the one who approved Emory Express Requisitions, please contact e-market@emory.edu for Approver-only training. When approver training sessions are needed, special sessions are scheduled.

Advanced Emory Express Training - Would your department like to have an advanced training session?

If your department is interested in an advanced Emory Express training session, contact Amy DeMore, Instructor, to schedule a session and discuss your department's specific training needs. A minimum of 12 current Emory Express users are required to be present.

Emory Express Demo's - Listen to these easy instructions for:
Emory Express Login
Payments to Companies via Emory Express

• To pay a company (not an individual), use Emory Express software
  – Use the Invoice Attached Form in Emory Express to process the payment
  – You will need the Supplier Invoice Number and the Invoice to attach – get PI or Dept Chair signature on invoice, depending on smartkey charged

• May also use Emory Express for: catering needs; subscriptions or memberships when AMEX is not accepted; Homeland Security Fee Payments

• To apply for access and training:
Emory Express
Invoice Attached Form
Invoice Attached Form

**Invoice Attached**

**Supplier Information**

Enter Supplier

Or supplier search

If this payment is to a supplier not currently found in the system (i.e. you are using the New Supplier selection) you MUST attach a completed W-9 form, a completed ACH form as well as provide an email address or fax number for the supplier in Internal Notes.

Requisitions without these components will be rejected. The ACH and W-9 forms can be found at Procure & Pay Forms.

Please note that you may still select a supplier regardless of the address listed under the supplier in the supplier search.

Emory Payment Services will maintain all REMIT address as invoices are processed.

**Purchase Information**

This form is for payments in which an Emory PO was not originally issued.

Directions:

- All fields are required and should be filled in to the best of your ability.
- If a piece of information is not known (e.g., Catalog Number), "N/A" is appropriate.
- A copy of the supplier's invoice MUST BE attached at the bottom of this form.
- If there are multiple PO lines for which the same invoice applies, you may select "Add to Cart" and click "Go" in the top-right corner of this screen. This action places the form in your cart without requiring a new form compilation. You may then edit the form information and take the same action as many times as needed before going to your cart and placing the PO for approval(s).
- Payment will be generated from this form and its attachments. Please DO NOT submit the invoice to Payment Services after you have completed this form.

**Form Type**

Invoice Attached

**Catalog No.**

**Product Description**

255 characters remaining expand | clear

**Quantity**

1

**Price**

**Internal Information**

**Supplier Invoice Number**

**Internal Notes (1000 chars)**

1000 characters remaining expand | clear

**Internal Attachments**

Add attachment...
Paying a New Supplier

• If you are unable to locate a desired supplier or vendor for an item or service in Emory Express, you must also attach a W-9 form, an ACH Form, and provide full contact info for the supplier/vendor including fax number and e-mail in the “Notes”

• https://www.finance.emory.edu/home/Procure%20and%20Pay/index_procare_pay_procare andpayforms.html
Purchases via Emory Express

- For any items purchased, order via Emory Express
- Whenever possible, use the preferred vendors listed in the Buying Guide
- Order from non-contract suppliers only when a product is not available from one of Emory’s contract suppliers
- Also consult the Buying Guide to determine the preferred method of payment for specific items
- It is possible to enter a requisition in Express without a supplier and receive assistance in locating the best possible price from Emory University buyers
The Emory Marketplace - Guiding you "Where and How to Buy" your goods and services

Our Emory Marketplace, is the HOME OF EMORY EXPRESS. Emory Express, is our e-procurement automation tool where faculty and staff order most commonly required products and specific services from University contract suppliers. Emory Express streamlines the order creation process, promotes the use of strategic supplier relationships and provides cost savings opportunities. To learn more, see Emory Express Training.

Shop from the "Commodity Index" below for the types of goods or services you need. Provided for each commodity are guidelines describing "Where to buy, How to buy, and the preferred method of Payment".

<table>
<thead>
<tr>
<th>Audio-Visual Services</th>
<th>Laundering Services (Lab Costs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books and Periodicals</td>
<td>Linen Rental Services</td>
</tr>
<tr>
<td>Box Lunch Providers</td>
<td>Nail Services and Shipping</td>
</tr>
<tr>
<td>Catering Services</td>
<td>Maintenance and Repair - Operations</td>
</tr>
<tr>
<td>Cellular Phones &amp; Pagers</td>
<td>Office Supplies</td>
</tr>
<tr>
<td>Chartered Bus Services and Shuttle Services for special events</td>
<td>Printing Services at Emory, and Preferred Print Suppliers for Large Print jobs, Business Cards, Letterhead, and more...</td>
</tr>
<tr>
<td>Computers, Printers &amp; Software Also for peripherals and info on how to configure your own quotes</td>
<td>Promotional Items - For your Emory logo products</td>
</tr>
<tr>
<td>Digital Copiers</td>
<td>Relocation of Faculty &amp; Staff</td>
</tr>
<tr>
<td>Education &amp; Development</td>
<td>Storage - Records/Documents</td>
</tr>
<tr>
<td>Emory Brochures and Publications</td>
<td>Storage - Other Items</td>
</tr>
<tr>
<td>Emory Photo/Video</td>
<td>Surplus and Recycling at Emory and Emory Environmental</td>
</tr>
</tbody>
</table>
Purchasing Restricted Commodities

• All purchases of restricted commodities must be processed through Emory's Buying in the Marketplace (Emory Express) regardless of the amount of expenditure.

• Restricted items may not be purchased with the P-Card

• Restricted Items: capital equipment; payments to individuals; leases or long-term rentals; animals; radioactive material; weapons and ammunition; controlled substances; medical/surgical supplies used in hospital or clinical patient care areas
Purchases via Emory Express
Export Control Policy

• For assistance with Export Control Compliance:

• Office of Research Compliance
  – Ste. 510, 1784 N. Decatur Rd.
  – Atlanta, GA 30322
  – Phone: (404) 727-2398; FAX: (404) 727-2328

• In RSPH: see Shelle Bryant (404)727-9437; FAX(404)727-98531; sbryant@emory.edu
Export Control Policy and Forms

- [http://www.orc.emory.edu/export_control/index.cfm](http://www.orc.emory.edu/export_control/index.cfm)
- Export restrictions under ITAR, EAR and OFAC regulations/sanctions often implicate research activity. For examples, a license *may* be required in order to:
  - Take a laptop computer or GPS system containing controlled software into a restricted country.
  - Ship research equipment outside of the United States.
  - Make a payment (including honoraria, or "anything" of value) to someone in or from one of the OFAC/embargoed countries.
  - Collaborate with a foreign national from embargoed countries or release certain technology or technical information to a foreign national while outside of the United States.
  - Allow foreign nationals from restricted countries to participate in certain research projects at universities in the U.S. if the research falls outside the scope of the [FUNDAMENTAL RESEARCH](#) exclusion.
Purchase of Items for Use Outside the US

• For research involving certain items or technologies, the University may be required to get the prior approval of the United States government before allowing any foreign nationals to participate in the research; collaborating with a foreign country regarding research; or sharing research information verbally or in writing with foreign nationals.
Payments Via Wire Request
Subcontract Payments

• Sponsored Program Subcontracts are also processed and paid via Emory Express
• The subcontract agreement draft is used by the Office of Sponsored Programs (OSP) to create the purchase order
• Invoices against the purchase order must be sent to:
  Emory University Accounts Payable
  1599 Clifton Road, 3rd floor
  Atlanta, GA 30322
Subcontract Payments

• Accounts Payable uploads the invoices against the purchase order (PO)

• Research Financial Analysts and the Principal Investigator in RSPH must both confirm:
  – contracted deliverables have been fulfilled
  – the subcontract is fully executed
  – their approval of invoice payment

• RSPH Business Services will then release payment of invoice amounts to the subcontractor
Payments for Facility Use, Space Rental or Lease Agreements

- Please be reminded that all facility use, space rental, or lease agreements relative to any space that is not owned and managed by Emory University must be reviewed and approved according to the Emory University Signature Policy. Before entering into any facility use, space rentals, or lease agreements with an organization, you are required to submit a copy of the unsigned agreement to RSPH Business and Finance.

- The availability of project funds to support the facility lease / rent agreement and the allowability of the expense will be confirmed. If funds are available and the expense is allowable, RSPH Business and Finance will confirm this by initialing the unsigned contract and return the unsigned form to Carolynn Miller, Sr. Business Manager in RSPH Business Services, who will then route the unsigned agreement to Jan Kimbrough at the Emory University Office of Business Management at 404-727-8391 janet.kimbrough@emory.edu.

- The Office of Business Management works in concert with the Office of the General Counsel in reviewing space lease arrangements and is the final signature authority for lease agreements. Once the agreement is approved by the Office of Business Management and the Office of the General Counsel, a signed copy of the agreement will be returned to Carolynn Miller for processing. Carolynn Miller will send the signed agreement to the Principal Investigator.

- A project staff member will need to process the requisition via Emory Express to enable payment. The approved and signed copy of the space rental agreement or lease should be attached to the requisition to allow RSPH Business and Finance to maintain a master list of such agreements.
Payments to Individuals

• Payments to individuals for services rendered
• Such payments are taxable (1099 & 1042 taxable) and include:
  – Payments to study participants
  – Awards (to non-employees and students)
  – Honoraria for guest speakers
  – Musicians/performing artists
  – Consultants/professional services
Payments to Individuals

• These payments are processed in Compass in the Accounts Payable module.
• For access, complete this form and give it to Carolynn Miller for approval and processing:
  • [http://compass.emory.edu/security_forms/Compass%20Security%20Change%20Request%20Form_All_EEs_v15.pdf](http://compass.emory.edu/security_forms/Compass%20Security%20Change%20Request%20Form_All_EEs_v15.pdf)
• Training Documents and Supplemental Job Aids:
  • [http://compass.emory.edu/training/trn_ap.html](http://compass.emory.edu/training/trn_ap.html)
Payments to Individuals

• Individuals (non-employees) needing payment are required to complete a W-9 form:
  • https://www.finance.emory.edu/home/Procure%20and%20Pay/how_to_pay_in_the_market_place/W9formtaxpayer.pdf

• Individuals desiring payment via direct deposit need to complete this form:
  • https://www.finance.emory.edu/home/Procure%20and%20Pay/ACHAuthorization%20r.pdf
Payments to Individuals who are Nonresident Aliens

• Payment for services rendered by those who are not US citizens or permanent residents of the US requires additional documentation:
  
  https://www.finance.emory.edu/home/accounting_svcscs/Accounting%20Help%20Desk/NRA_CHEATSHEET%20MC.pdf

• Foreign Source Statement
  

• W-8BEN (instead of the W-9)
  
  https://www.finance.emory.edu/home/accounting_svcscs/Accounting%20Help%20Desk/W-8BEN.pdf
Access to Compass-Accounts Payable

• Bring your access request form to Carolynn Miller, rm 848 in the Grace Crum Rollins Bldg who will approve and send your request

• http://compass.emory.edu/security_forms/Compass%20Security%20Change%20Request%20Form_All_EEs_v15.pdf

• Complete the training with the simulation software and save copies of the supplemental job aid and additional support materials:

• http://compass.emory.edu/training/trn_ap.html
Emory Purchasing Card (P-Card)

- For purchases $1,499.00 or less such as:
  - Professional Licenses/Certificates
  - Memberships and Registrations
  - Subscriptions
  - Emory Catering
  - Local business meals or boxed lunches
  - Recurring expenses such as storage, coffee services, box lunches for business meals
Emory Purchasing Card (P-Card)

- Use to purchase goods and services not available through Emory Express (check first!)
- Cell phone
- Van rentals
- Grocery store purchases
- Field purchases for immediate work-related use
- May not use to purchase restricted items
- Upper limit of $1,499.00
Not Allowable on P-Cards

- Capital equipment
- Payments to individuals
- Leases and long-term rentals (get pre-approval from Emory VP for Business Services & General Counsel prior to processing in Emory Express)
- Animals
- Radioactive material
- Weapons and ammunition
- Controlled substances
- Medical/surgical supplies used in hospital or clinical patient care areas
P-Card Holder Responsibilities

• Ensure card security
• Comply with University policies
• Do not purchase prohibited items
• Do not share your P-Card
• Use only for University business purposes
• No purchase should exceed $1,499.00 and charges should not be split across receipts to stay below this limit
P-Card Process

- Cardholder makes purchases
- Smartkey to be charged should be indicated on the receipt as well as Business Purpose
- Receipts need to be signed by the PI if the purchase is charged to a sponsored program
- Receipts need to be signed by the Department Chair if the purchase is charged to a department account
P-Card Exceptions

• For a temporary increase to the credit limit for a p-card, e-mail the business reason and dates for the request to both Carolynn Miller and Tascha Short prior to making the purchases.

• For a temporary exception for a single transaction purchase limit, e-mail the business reason and dates for the request to both Carolynn Miller and Tascha Short prior to making the purchases.
P-Card Holder Responsibilities

- Any exchanges or returns to suppliers should result in a credit to the account, never cash.
- Except when purchasing food, flowers, or gasoline, it is the cardholder’s responsibility to inform vendors that Emory is tax-exempt.
- Purchase log, receipts, smartkeys to be charged, and signature authorization P-Card purchases must be provided to RSPH Business Services within 5 days of the purchase date.
RSPH Business Services
P-Card Process

• All P-Card purchases and receipts must reviewed within 5 business days of purchase and allocated to the correct smartkeys

• Purchases that are not allocated to the correct smartkey and account will default to a designated smartkey and account code

• Cardholders who are consistently delinquent in turning in signed receipts with smartkeys will have their cards revoked
Gifts and Celebrations

• There is an Emory policy that applies to all University departments and schools re: when it is and is not appropriate to give gifts or have celebrations paid for with University funds:

• http://policies.emory.edu/policy/index_pdf.cfm?policy_number=2.5
Local Business Meals

- Involve non-Emory individuals as participants
- Expenses must be reasonable and appropriate
- Receipts must be provided
- Specific Emory-related business need for the meal must be provided
Local Business Meals

• Meals with Emory colleagues should be considered a personal expense unless:
  – A non-Emory employee is present and business is being conducted; or
  – The meal is in honor or an Emory employee beginning or ending employment or significant other achievement; or
  – Business being conducted among Emory employees cannot be done in the office or at another time; or
Local Business Meals

– An explanation as to why the meeting could not take place in the office must accompany the purchase documentation/reimbursement request; or

– Rare or atypical instances, where, with the approval of a supervisor, employees may work during normal meal breaks, e.g., working lunches
Local Business Meals

• In all instances, a list of employees, their titles, guests, and their affiliations must accompany the request for reimbursement or charge to an Emory or sponsored program account

• An original, itemized receipt is also required

• See Policy 2.106 at policies.emory.edu
Questions?

Please contact:
Carolynn M Miller
(404) 712-8379
cmmille@emory.edu