

The PO Renewal form is to be used for annual or regularly scheduled services, such as a copier maintenance agreement. This can also include the regularly scheduled delivery of goods such as bottled water. When such orders are placed on this form, it is easy for departments to generate a list of their renewal POs to re-submit as a new fiscal year approaches.

Detailed instructions on how to generate this list are available in the training materials lesson titled "Re-Submit Renewal Orders".

This form is not to be used for punch-out catalog suppliers, nor for the repetitive ordering of tangible goods. Orders for goods should be placed on an as-needed basis.

Is the right form for your purchase? Take a minute to consider these questions:

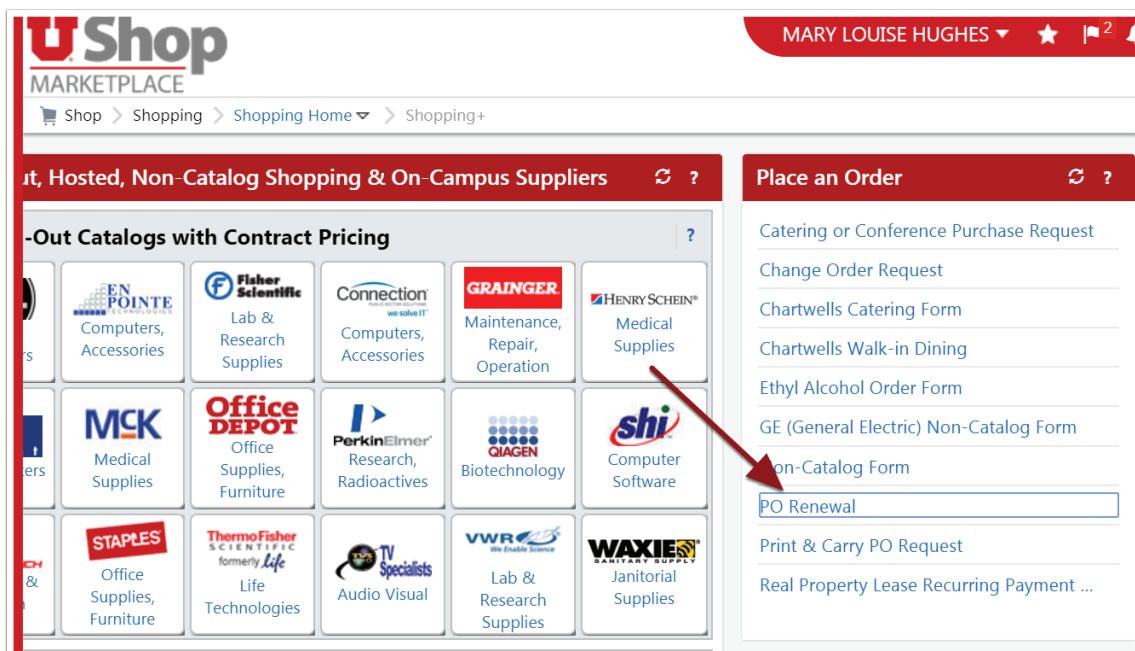
1. Is my order for annual or regularly scheduled services?
2. Is there a high frequency of delivery, i.e. : weekly?
3. Do I have a contract or service agreement in place?
4. Have I checked the contract dates to ensure that it is still valid?
5. Have I contacted the Purchasing Department to discuss the possible use of the PO Renewal?

If the answer to any of these questions is "yes", proceed with the PO Renewal form.

The Purchasing Department will contact with you if further discussion is required.

Location

The PO Renewal form is found in the Place an Order section of the Shopping Dashboard. Click to open.



Supplier Information

- 1. Search for your supplier using the Enter Supplier field. If your supplier is not yet available in UShop, type "New Supplier" in this field.
- 2. You may search for the supplier in CIS by clicking on the Vendor Search link above and following the prompts, or
- 3. You may provide the New Supplier Details in the fields below.

Supplier Information?

Please search for your supplier using the **Enter Supplier** field. If your supplier is not yet available in UShop, type "New Supplier" in the **Enter Supplier** box below, and fill in the **New Supplier Details** section. You may search for existing PeopleSoft vendors using the **Vendor Search** web app available in CIS.

Enter Supplier

1

or
[Supplier Search](#)

New Supplier Details:

Supplier Name

3

If you have a contact name or phone number for the supplier, you may enter it below. This helps the Supplier Enablement Team in processing your request.

Contact Name and/or Phone Number

Enter either an email address (preferred) or fax number where purchase orders will be distributed to the supplier when orders are placed.

PO Email Address or Fax Number
(used to distribute the PO to the supplier)

Additional Details

What you type here will be printed on the PO. In this section you may provide information for the Supplier that you do not include in the Product Description. An example is a delivery contact name and number.

Provide any additional details to be sent to the supplier in the box below.
NOTE: All comments and details in this area will print on the purchase order in the **Additional Details section.*

1000 characters remaining

[expand](#) | [clear](#)

2

PO Renewal Details

1. Product Description. The information typed in this field will be seen on the Purchase Order as one PO line item.

Please include:

- A clear description of what you want to buy.
- The beginning and end dates of the order.
- Service or Billing frequency.
- Any other details such as equipment serial numbers, reference to an attached agreement, etc.

2. Quantity and Estimated Line Unit Price.

- Type "1" if you are considering this order as one job for the whole year. In this case you will indicate the total Estimated Line Unit Price for the whole order.
- Or, you may choose to indicate quantity based on the number of deliveries/service calls, such as "12" for monthly. In this case, you will indicate the Estimated Line Unit Price as the cost for one delivery/service call.

3. Indicate the Service Start and End dates.

PO Renewal Details ?

Fill in the purchase details in the fields below. Fields shown in **bold** are required. Include a description of the services being provided and any other details (equipment serial numbers, etc.) relating to this Purchase Order request. **NOTE: The Product Description will appear on the PO as a line item.*

Product Description	<div>1</div> <div>254 characters remaining expand clear</div>
Quantity	<div>2</div>
Estimated Line Unit Price	

Enter the service start and end dates below. These dates will print on the PO.

Service Start Date	<div>3</div> <div>mm/dd/yyyy</div>
Service End Date	<div>mm/dd/yyyy</div>
Commodity Code	

Product Health & Safety Disclosures

This section is required.

1. If you have no disclosures to declare, click No.
2. If you have disclosures to declare, click Yes, and check the boxes below to give details.

Product Health & Safety Disclosures ?










Product Health & Safety Disclosure(s): According to the State of Utah and University of Utah Procurement law, you are required to list any hazardous materials or controlled substances being delivered to or used on campus. These require the approval of the Department of Environmental Health & Safety and/or Radiological Health.

Are any of the items on this purchase a controlled substance, hazardous and/or radioactive?

☐ No
☐ Yes

If yes, select all that apply from the list below.

Health and Safety

- ☐  Controlled substance
- ☐  Recycled
- ☐  Hazardous material
- ☐  Radioactive
- ☐  Rad Minor
- ☐  Select Agent
- ☐  Toxin
- ☐  Energy Star
- ☐  Green

Purchasing Department Details

1. Provide pertinent information about this order, such as, is there currently a Contract in place?
2. Does this order require a competitive Bid or Sole Source approval?
3. Be sure to attach any applicable documents. However, do not attach documents that are confidential or sensitive. **Contact Purchasing to determine how they want to receive these confidential or sensitive documents.**

Purchasing Department Details ?

PO Renewals will be evaluated by the Purchasing Dept. and a Buyer will contact you if more information is needed.

- Using the box below, please indicate any **CONTRACT** information applicable to the supplier and/or this Purchase Order request.
- If your department has a Contract *already in place* with the supplier, please attach it using Internal Attachments in the **Attachment Details** section of this form. **DO NOT attach confidential or sensitive documents.**

1

1000 characters remaining

expand | clear

Will this order require a Bid, Sole Source approval or other special attention from Purchasing?

☐ No

2

☐ Yes

*Note: If this is a Sole Source request, you must fill out and attach the **Sole Source Request Form**. If this is a competitive bid request, please attach the bid specifications. These and other relevant attachments should be added as Internal Attachments in the **Attachment Details** section.*

Attachment Details

1. To attach documents intended only for the Purchasing Department or other UShop users, click on the Add Attachments button under Internal Attachments.
2. Keep in mind that External Attachments can be seen by all UShop Users and will also be sent to the supplier.

Attachment Details ?

Internal Attachments are not sent to the supplier.

Internal Attachments

1

Add Attachments

External Attachments are sent to the supplier with the PO and may be used to attach documents such as quotes.

External Attachments

2

Add Attachments

Add and go to cart

When you have completed the form, scroll up to Available Actions and select Add and go to cart. Click Go.

Available Actions:

Add and go to Cart

Go

Close

If you are submitting renewal orders in advance for the fiscal new year, you will need to edit the Accounting Date.

To do this, when your cart is ready to go, click on *Proceed to Checkout*.

2 Item(s) for a total of 24.86 USD

Proceed to Checkout

 or

Assign Cart

Accounting Date

- 1. Click on the Billing Options tab
- 2. Click on the edit link.

General	✓	Billing Options 2 edit
Shipping	✓	
Billing 1	✓	
Accounting Distribution	✓	
Internal Notes and Attachm...	✓	
		Accounting Date no value
		Hold Invoice for Approval x
		Handling Code Override no value
		Separate Payment Override no value

Edit Accounting Date

The first billing option is *Accounting Date*. For new fiscal year orders, select “July 1” of the current year and click Save. You may enter any date in an open accounting period. General Accounting has now opened accounting periods for four months going forward.

Billing Options

Accounting Date

mm/dd/yyyy

Hold Invoice for Approval

☐

Handling Code Override

Separate Payment Override

Payment Message

Require exact PO-to-Invoice match

☐

Prevent automatic PO distribution. Check box to manually distribute PO.

☐

Save

Cancel