



# ADDY TIPS



## Fiscal 2020 New Year Information

Requisitions for fiscal year 2020 can be entered into UCF Financials beginning at 7 a.m. on **Tuesday, July 2, 2019**.

### What is changing for fiscal year 2020?

#### *New Required Webcourse*

A new, required webcourse will be available on July 1, 2019, for requisition creators and approvers. **PURUPA: Unauthorized Procurement Actions** provides training on understanding and preventing unauthorized procurement actions (UPAs). The course must be completed by November 1, 2019, to maintain access as a requisition creator or approver. To register for the course, navigate to **myUCF > Employee Self Service > Learning and Development > Request Training Enrollment** and search by course number "PURUPA."

#### *Printing Purchase Orders*

Beginning July 1, the process for printing Purchase Orders has changed. For instructions detailing the new procedure, see the revised Addy Note [Printing a Purchase Order](#).

### Tips for 2020

**Reminder:** Update the PRC Details page on the DAL whenever a requester leaves or transfers departments. For detailed instructions on the PRC Details page, see the Addy Note [Completing the PRC Details Tab](#).

**Reminder:** The Composite Fringe Benefit rate has been updated for Fiscal 2020. The specific rates for 2020 are available on the [Composite Fringe Benefit Rate](#) page on the Finance and Accounting website.

**Reminder:** Blanket PO lines (and travel blanket PO lines) must have a **Due Date** of June 30, 2020. Regular travel POs will still use the trip end date in the **Due Date** field.

**Reminder:** Items should be received under the Business Unit in which they are purchased. Accordingly, items purchased under the Business Unit of UCF01 should be received using Business Unit UCF01, and items purchased under Business Unit RFD01 should be received using Business Unit RFD01.

**Reminder:** All travel purchase orders (POs) will automatically be closed 60 days after the travel has concluded to ensure timely processing. Prior to the automatic close date, provide the Travel Department with the voucher for reimbursement (form 41-901), available on our website at: <http://fa.ucf.edu/forms/>, along with all receipts and other relevant information. Blanket travel POs will continue normal procedures.



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## Tips for 2020 (Continued)

**Reminder:** When you receive the last amount on a purchase order (PO line) that has been rolled over into fiscal year 2020, please notify Vendors Payable in F&A to close that PO (or PO line) as soon as possible.

**Tip:** Copying a requisition from the past fiscal year, the **Due Date** field will not default to the current date and will be copied to the value the field has on the original/source requisition. Update the **Due Date** field to a current, meaningful value to ensure the copy works properly.

## Requisition Best Practices

- For detailed instructions on adding comments and attachments, refer to the Addy Note [Adding Comments and Attachments to an ePro Requisition](#). Use the appropriate header comment when creating a requisition for a change order; use Comment ID DEP004 in place of DEP001 in this instance. To ensure the approver can view the attachment, requester must attach the item at the Line Comment level, not the Header Comment level.
- Do not put sensitive data, such as FedEx or other account numbers, into requisition descriptions. Discounts should be applied to requisition line totals, not entered as a separate, negative line amount. Refer to the current [List of Categories for Requisitions and Purchase Orders](#) when deciding how to categorize a purchase.
- For details and procedures regarding the procurement of hazardous materials or controlled substances, please refer to the [UCF Environmental Health and Safety website](#) and the Addy Tip [Creating a Requisition to Purchase Hazardous Materials](#).
- Departments often inquire about the status of their freight lines on a Purchase Order for which the merchandise has already been paid. For detailed instructions, see the Addy Tip [Application of Freight Charges](#).
- Regarding **prepaid assets**, if your asset purchase requires a prepayment (deposit), you should make that deposit amount a separate line on the requisition so that Accounts Payable can pay that line on its own. Requisitions created to purchase assets must be set up as quantity (not amount) to facilitate asset processing.