Wednesday, April 16th, 2014 – Gateway User Group Meeting Minutes

Attendees: Ron Hirst, Lisa Klock, Hannah Morand, Terri Jo Ortega, Adriana Perez, Calli Price, Daniel Stack, Robin Testa, Luisa Velez

Not Present: Sara Bard, Karen Cisneros, Kara Kaneda, Mike Moore, Adriana Perez, Kathy Scheidemen, Tedi Tehrani

Guests: Megan Moore

Introduction:

Hannah updated the group on some previous action items including the proposal for Restricted/Unrestricted Receiving Protocols for Jim Corkill’s sign off. Her goal is to finish up within a week or so for review by the group.

Issue: eCOE Update

Discussion: Hannah updated the group that HD Supply’s catalog has been enabled in Gateway. It was included in the most recent note to campus. Sigma Adrich’s catalog will also be enabled shortly as soon as the cutover to the correct SciQuest ID can be made without effecting current requisitions in process. Cardinal Health punch-out testing is about to begin as San Diego’s testing is winding down. The group wanted to ensure that two things were possible: 1. That only Student Health is able to access the punch-out as sensitive products can be purchased within and 2. That Student Health can be involved in the testing. Hannah mentioned to the group that Mike Anderson has already worked with her to select those that will be involved with the testing. Hannah also has built off of previous workflow in place to ensure that the punch-out can only be accessed by certain users.

Summary/Action Items: N/A

Issue: Federal Funds Increase ($3,000 to $10,000) w/o Campus Purchasing Review

Discussion: Since it has been a year since ONR (Office of Naval Research) has visited our campus for audit review of Federal Fund orders and procedures, Procurement Services wanted to take the temperature of the group to see the viability of moving the threshold of Campus Purchasing Review from its current place at $3,000 to $10,000 for Federally Funded orders. Post-audit would still be in place for all orders, but review on the front end of the Price Reasonableness/Sole Source Form would only occur on orders above $10,000. The group overwhelmingly felt that this was too risky to move the threshold and that the work on the front end at $3,000 was worth the effort to ensure that we were in compliance and that Federal policy was met. There was discussion around the “complaints” that Procurement receives around the amount of work that the Price Reasonableness Form takes, but that the response ultimately needs to be that this form is a requirement of receiving Federal grants.

Summary/Action Items: No action items, continue with workflow as planned.
**Issue: Contract WF Update**

Discussion: There was a quick update to let the group know that Contract Workflow is live in the system and that Calli, Ron Betancourt and Hannah are working one-by-one with departments to make them feel comfortable with the onboarding. We are working on building screenshots to incorporate with the Gateway Desk Manual. Lisa volunteered to be the next group to onboard.

Summary/Action Items: Follow-up with Lisa to schedule time to work with her group on their contracts.

**Issue: Bus Charters**

Discussion: Bus Charters have been a complicated matter primarily because they have been “housed” in both Gateway and Travel & Entertainment. This had been a confusion for all parties involved; Departments, Accounting and Procurement, as some were paid via Purchase Order and others have been paid via Form 5. The discussion lately has been to find a permanent home for the Charters, either with T&E (and thus Form 5) or with Gateway (and thus Purchase Order/Invoice). The group discussed this at length and felt that it could go either way as there really are two different business needs for Charters: Service (for programmatic needs of a department) vs. Travel (where athletics transports their teams for events). The whole group felt that Charters are particularly risky business and insurance needs to be involved in the process. This made the group lean back towards Gateway/Purchase Orders to ensure that risk was covered.

Summary/Action Items: Follow-up with T&E to formalize process and ensure that they are also comfortable with process.

**Issue: Open Discussion / Ron Hirst’s Invoice Discussion – Duplicate/Cancelled Invoices**

Discussion: Ron brought the group a list of duplicate/cancelled invoices for March 2014 to show examples of the highest “issue” suppliers that routinely have duplicate/cancellation issues for the last 30 days. The Alternative is the biggest supplier on the list with 121 invoices in March alone. The list served as a “FYI” to remind the group to pass along to their colleagues and departments the issues that can arise when resending multiple invoices on top of invoices that the supplier has already sent through for processing. It was also a great reminder of the need to send in legible invoices that meet the requirements noted in the InvoicesONLY auto reply email.

Summary/Action Items: N/A