

ADVANCED TECHMART TRAINING

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What TechMart Form Do I Use?

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CHANGE ORDERS

- **Purpose:** Use this form if you want to modify an existing Purchase Order or Research Subcontract.
- **Example:** Increase funds, add a line(s), change the PTA, cancel a PO, renew/extend an existing agreement, etc.
- **Form Processing:** End User prepares the Change Request > Requisition goes to a Buyer for processing & approval > Once approved, Change Request ends workflow and the Buyer makes the change to the PO in both TechMart & Oracle.

DECLINING BALANCE PO

- TechMart Supports 4 types of Declining Balance PO's
 1. Blankets
 2. Independent Contractor Service Agreements
 3. Research Subcontracts
 4. Service Agreements

DECLINING BALANCE PO

1. Blanket PO

Purpose: authorizes multiple low-dollar purchases with a Supplier over the course of one year, whereby accurate projections of multiple Spot Buy PO's would incur unnecessary administrative costs. The purpose of a BPO is to eliminate repetitive administrative efforts by the campus requisitioner and Procurement Services by streamlining the ordering process.

Example: This type of PO can be used when you are funding the Blanket for a full year, with the same PTA while assuming 2 or more invoices monthly from the designated Supplier.

Processing: End User prepares the Requisition > Requisition goes to a Buyer for processing & approval > Once approved, a PO is generated and gets sent to the Supplier. NOTE: Supplier will need to reference this PO on all invoices for the duration of this DBPO.

For an instructional video on how to use this form, please click [here](#)

DECLINING BALANCE PO

2. Independent Contractor Services Agreement

Purpose: used to set up a new Independent Contractor Services Agreement with an individual or sole proprietor (not a Company/Corporation). An Independent Contractor Services Agreement should be initiated prior to the commencement of services. If you have already been invoiced for services rendered lieu of the Declining Balance PO form.

Example: Individual/Sole Proprietor will be working with a Dept to create original artwork.

Processing: End User prepares the Requisition > Requisition goes to a Buyer for processing & approval > Once approved, a Contract is generated and gets fully executed between both parties. A PO number will be created, but a PO will not be sent. Instead, they will receive a Contract with that PO number used as a reference number.

NOTE: Supplier will need to reference this PO on all invoices for the duration of this DBPO.

For an instructional video on how to use this form, please click [here](#)

DECLINING BALANCE PO

3. Research Subcontract

Purpose: Used for setting up a new Subaward/Subcontract

Example: Funding Year 1 of sponsored research with MIT

Processing: End User prepares the Requisition > Requisition goes to a Contracting Officer for processing & approval > Once approved, a PO is generated. A PO number will be created, and a Contract will be sent to the Supplier manually by the Contracting Officer

NOTE: Supplier will need to reference this PO on all invoices for the duration of this DBPO.

DECLINING BALANCE PO

4. Services Agreement

Purpose: Used for the purchase of goods or services over a fixed period of time, with a set dollar amount and PTA.

Example: 3 Year service agreement for pool maintenance & cleaning, which will be funded annually each year.

Processing: End User prepares the Requisition > Requisition goes to a Buyer for processing & approval > Once approved, a PO is generated and gets sent to the Supplier. A PO number will be created and sent to the Supplier.

NOTE: Supplier will need to reference this PO on all invoices for the duration of this DBPO.

For an instructional video on how to use this form, please click [here](#)

NON-CATALOG LINE ITEM

- **Purpose:** To order from a non-catalog supplier based on a quote or established pricing.
- **Example:** Vendor sends you a Quote for items to purchase; the end user would attach this quote and make the Requisition mirror all lines on the Quote to complete the non-catalog line item.
- **Processing:** Requisitioner clicks on the “Non-Catalog Item” on the Shopping Home Page & enters their lines > routes to a Buyer for processing > upon approval a PO will get issued to the Supplier.

NOTE: This Form will allow for change orders to be made to the PO at a later date. These changes include: adding a line, splitting PTA's, updating Quantity/Pricing etc.

SPOT BUY

- **Purpose:** To order from a non-catalog supplier based on a quote or established pricing.
- **Example:** Vendor sends you a Quote for items to purchase; the end user would attach this quote and make the Requisition mirror all lines on the Quote to complete the non-catalog line item.
- **Processing:** Requisitioner clicks on the “Non-Catalog Item” on the Shopping Home Page & enters their lines > routes to a Buyer for processing > upon approval a PO will get issued to the Supplier.

SUPPLIER AFTER-THE-FACT

Purpose: To process payment for unauthorized Supplier transactions made on behalf of Caltech that run counter to Caltech purchasing policies and procedures, and are monitored for training and reporting purposes. After-the-Fact purchases, regardless of dollar value, require justification and financial approval.

Example: An emergency situation presented itself and immediate service was necessary from a supplier. Instead of properly issuing a Purchase Order, the vendor agreed to the terms of the service, completed the service and then provided you with an invoice for payment.

Form Processing: End User prepares the Requisition > Requisition goes to a Buyer for processing & approval > Once approved, a PO is generated and gets sent to AP automatically for the processing of payment. Supplier does not receive a PO.

For an instructional video on how to use this form, please click [here](#).