

eVA and Purchase Orders

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What is eVA?

eVA, “electronic Virginia,” is the Commonwealth’s online, electronic procurement system. This web-based vendor registration and purchasing system allows state agencies, colleges, universities, and many local governments to conduct all purchasing and sourcing activities for goods and services for their agency through this system. It is designed to facilitate, integrate, and streamline the entire procurement process for agencies of the Commonwealth by:

- ▶ Allowing direct entry of purchase orders and change orders
- ▶ Allowing approval flows for purchases
- ▶ Providing ease of purchasing through vendor punch-out catalogs
- ▶ Facilitating payment directly to vendors
- ▶ Integrating with the Banner ERP System
- ▶ Providing a centralized area for solicitation notifications which allows for maximum competition



UMW and eVA

eVA is the only system available to UMW for the creation of purchase orders; as the University does not have the benefit of its own Procurement system. UMW purchase requisitions are entered into the eVA system prior to making a purchase. Through an approval workflow process, the entered requisition results in an official purchase order to suppliers for acquiring goods and/or services to be used by the University in fulfilling its mission.

The Commonwealth requires that all state government spend data is available for public scrutiny in the interest of transparency to taxpayers. *Therefore, UMW is required to use eVA for entering purchase orders.*

UMW System Integration:

- ▶ eVA integrates with UMW's Banner ERP system. Purchases not being paid by charge card are encumbered in Banner against the budget data entered on the check-payment designated purchase orders.
- ▶ eVA does not integrate with the Bank of America Works system that UMW uses for its online charge card reconciliations. Purchases placed in eVA will not flow over into Works, so manual budget allocation is required for those purchases.

Although there are some exceptions to the requirement of creating purchase orders, most of the University's purchasing needs go through this system.

Purchase Orders

What is a Purchase Order “PO”?

A purchase order is a legally committing document of agreement between you and a vendor for the purchase of a good or service. It should detail the entire picture and story of the purchase:

- ▶ **Who** - the agency, the campus buyer/cardholder
- ▶ **What** - good or service being purchased (item description, quantity, price), procurement transaction type (general category of item), NIGP code (more specific category of item)
- ▶ **Where** - vendor supplying the good/service, location for shipping and delivery
- ▶ **When** - the fiscal year, need-by dates
- ▶ **Why** - generally to support the mission of the University
- ▶ **How** - procurement path (contract #, DSBSD vendor designations, comment box for justifications, requirement exemption codes, and prerequisite approvals), FOAP for budget allocation

Purchase Orders should be created in eVA at the point of making the purchase, not when an invoice is received for payment. This helps ensure the vendor fully understands what is being requested (items, quantities, costs, payment terms) and the terms to which they need to provide the goods or services.

eVA Purchase Order Exceptions

There are a few exceptions to the eVA purchase order requirement. These include:

- ▶ Items found in Category A and Category C in the Small Purchase Procedures for Goods and Non-Professional Services
- ▶ Agency 8xxx Fund purchases*
- ▶ Foundation Fund purchases
- ▶ Government-to-Government Purchases

** When procuring from a contracted vendor, orders using Agency 8 funds or orders shared between state and non-state funds must be placed in eVA.*

Purchase Order Process

Creation & Issue

The first step in issuing a PO is creating a Purchase Requisition. eVA designates this step by using the identifier "PR" for the order. Purchase Requisitions are purchase orders that are in the composing or submitted status awaiting approval.

Ex: PR1234567

Submission

Once submitted, the PR goes through a series of internal approvals before becoming fully executed or "ordered." eVA designates a fully approved PO with a payment type identifier:

- PCO = fully executed PO, being paid for with a charge card
- EP = fully executed PO, being paid for by check/direct pay

Ex: PCO1234567; EP1234567

Change

If a PO needs to be altered or changed in any way to correct pricing, quantities, or other pertinent information, you would initiate a Change Order. eVA designates change orders by adding a version identifier onto the end of the PO. If it's your first time changing an order, the change order # would end in a -V2. Subsequent change orders receive sequential numbers after that.

Ex: PR1234567-V2; PCO1234567-V3; EP1234567-V4

Exercise 1

Scenario:

My department is asking me to purchase a embroidered table cloths for a student club. It is going to be paid with my Finance Card because of the non-state fund being used. Do I need to enter a purchase order for this?

Go to the next slide to show the answer.

Exercise 1

Answer:

Yes. Tablecloths are not an exempt-from-eVA item per the Small Purchase Procedures. Also, Non-State funds, except for Agency 8xxx funds, are not exempt from eVA. This purchase will need a purchase order entry in eVA.

Exercise 2

Scenario:

I need to amend my purchase order to account for a price discrepancy between the invoice and what I initially entered in eVA. This order is being paid by check and this is my 4th change order.

Question:

What should the resulting fully executed purchase order number look like?

Go to the next slide to show the answer.

Exercise 2

Answer:

EP1234567-V5. The purchase order has the identifier of EP because it is being paid by check, and the ending identifier of -V5 because this is the 4th change order. The initial purchase order would be version 1, then add 4 changes = 5.