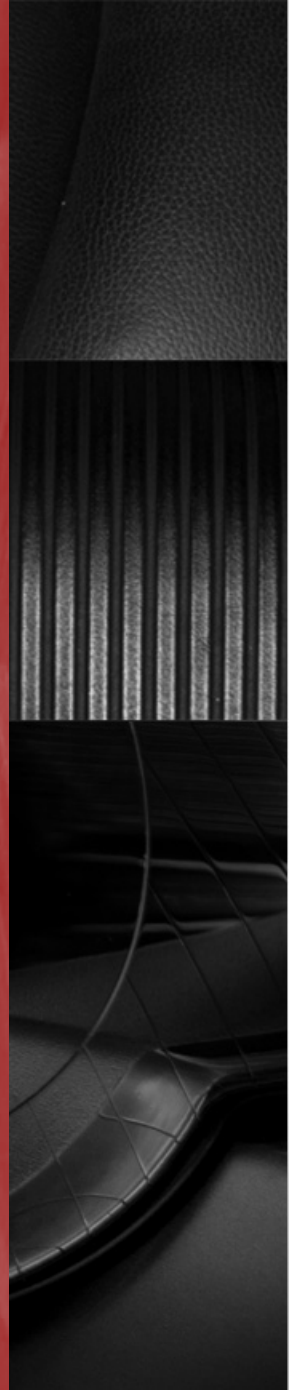



# Confirming Order Process and Procedure

Procurement Services






Confirming Order forms are used to pay invoices where the goods/services have already been provided without a requisition or purchase order in place. Only Procurement Services is authorized to commit the University for the purchase of goods and services.

**Scenario:**

*Mary needs to purchase three sandwich trays for a meeting next month. She calls Bob's Deli and orders three sandwich trays. Bob delivers the trays and leaves an invoice requiring payment. Mary will now have to complete a Confirming Order form for Bob's Deli payment.*

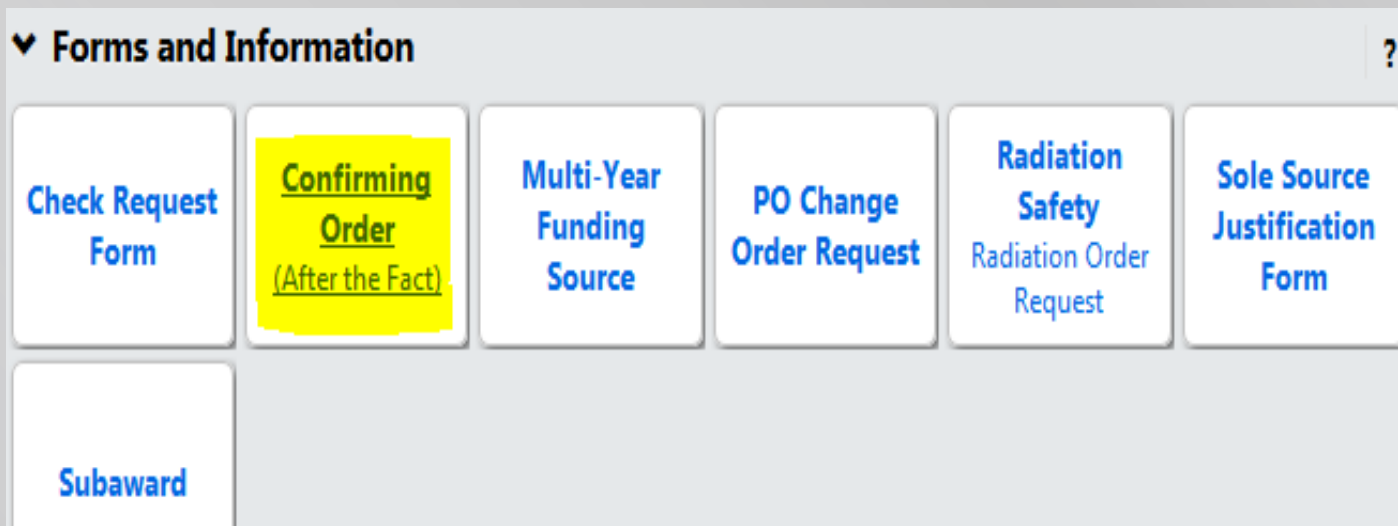
*The issue with this scenario is all purchases are required to first go through Purchasing. How would one go about placing this order through the proper channels?*



*The first option would be for those who have a Purchasing Card, to make this payment with a P-Card for vendors who accept credit card payments. If a P-Card is not available or the supplier does not take a P-Card, the process would be...*

*Mary needs to purchase three sandwich trays for a meeting next month. She calls Bob's Deli and request a quote for her order. Mary logs into Smart Source to prepare a non-catalog order and attaches the quote. This order will be routed through the approval process and funds will be encumbered for the amount of this order. Once the order is delivered, Bob's Deli will submit the invoice to [drexel\\_university@edmamericas.com](mailto:drexel_university@edmamericas.com) for payment. The invoice will be keyed and scanned into the Smart Source system. Mary will receive a notification for Invoice approval. Once Mary approves, the invoice will be processed by Accounts Payable for payment.*

Once you have determined the Confirming Order is the proper form for payment, select the Confirming Order Form in SmartSource:



The screenshot shows a user interface for 'Forms and Information'. The title 'Forms and Information' is at the top left with a downward arrow, and a question mark icon is at the top right. Below the title is a row of six buttons: 'Check Request Form', 'Confirming Order (After the Fact)', 'Multi-Year Funding Source', 'PO Change Order Request', 'Radiation Safety Radiation Order Request', and 'Sole Source Justification Form'. The 'Confirming Order (After the Fact)' button is highlighted in yellow. Below this row is a 'Subaward' button.

▼ **Forms and Information** ?

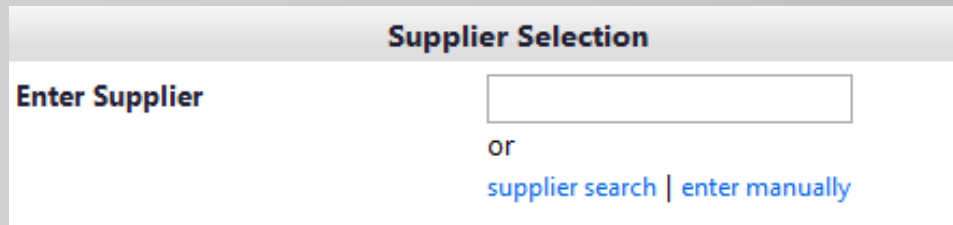
- Check Request Form
- Confirming Order (After the Fact)**
- Multi-Year Funding Source
- PO Change Order Request
- Radiation Safety Radiation Order Request
- Sole Source Justification Form

Subaward

The Confirming Order form contains two sections:

- **Request Info:**

- In this section, you will provide:
  - Supplier Name



The screenshot shows a form titled "Supplier Selection". On the left, the text "Enter Supplier" is displayed. To its right is a rectangular input field. Below the input field, the word "or" is centered. At the bottom of the form, there are two blue links: "supplier search" and "enter manually", separated by a vertical bar.

**Please refer to the Entering Supplier Manually Job Aid if your supplier's name does not appear in the search**



The Confirming Order form contains two sections:

- **Request Info:**

- After The Fact Justification
  - This is where you will explain the circumstances for making this purchase outside of the Smart Source system.
- Supplier Invoice Number
- Invoice Date

The Confirming Order form contains two sections:

■ **Request Info:**

○ Supplier Questions

- If the payee is not a US Citizen or Permanent Resident Alien and service was performed in the United States, you will need to submit this payment on a paper check request and email it directly to the Tax Office at [taxdept@drexel.edu](mailto:taxdept@drexel.edu).
- If the payee is not a US Citizen or Permanent Resident Alien and service was performed outside of the United States, a Foreign Source form is required to be attached to your SmartSource check request. Contact the Tax Office at 215-895-6880 for more information.
- Payments in foreign currency cannot be made via a SmartSource Check Request. You will need to submit a paper check request to [acctpay@Drexel.edu](mailto:acctpay@Drexel.edu).

|  |                           |
|--|---------------------------|
| <b>Is the payee a U.S Citizen or Permanent Resident Alien?</b> | <input type="radio"/> No  |
|  | <input type="radio"/> Yes |
| <b>Was service performed in U.S.?</b>                          | <input type="radio"/> No  |
|  | <input type="radio"/> Yes |
| <b>Will this be paid in foreign currency (non-US dollars)?</b> | <input type="radio"/> No  |
|  | <input type="radio"/> Yes |

## The Confirming Order form contains two sections:

### ▪ Request Info:

#### ○ Contract/Service Questions

- If the requisition is for the payment of a service, please select yes.
- If the requisition has an associated contract or agreement, please select Yes and ensure the document is attached to the form.

|   |                           |
|---|---------------------------|
| <b>Is this requisition for a service?</b>   | <input type="radio"/> No  |
|   | <input type="radio"/> Yes |
| <b>Is a contract or agreement attached?</b> | <input type="radio"/> No  |
|   | <input type="radio"/> Yes |

#### ○ Internal Attachments

- This section requires you to upload your invoice

**Please Note: Not attaching documentation in this section will cause an error in the checkout process**



The Confirming Order form contains two sections:

- **Items Purchased After the Fact:**

- In this section, you will enter the:
  - Description
  - Price
  - Quantity

| Items Purchased After The Fact (ATF) ? |        |          |            |
|--|--------|----------|------------|
| Description                            | Price  | Quantity | Ext. Price |
| test                                   | 500.00 | 1        | 500.00     |
|  |        |          | 0.00       |
|  |        |          | 0.00       |
|  |        |          | 0.00       |
|  |        |          | 0.00       |

Once the form has been completed, submit the form to your cart for checkout. At this point you can proceed with the checkout process and submit your requisition.