

Financial- FM Team - Purchasing PO/Contract requests

	Activity	Who	Form/Hyperlink
Step 1:	Location of documents- Forms are located on FM Intranet Forms site. FM-105 and FM-106 are specific to FM. This site contains most WMU Facilities	FM Employees, Directors and Admin complete forms.	https://www.fm.wmich.edu/intranet/forms
Step 2:	WMU Purchasing - Purchasing assists all WMU departments in procuring goods and services needed.	FM Employee and Admin complete forms. Purchasing requests BID FM-105 to start the bid process. VP Business and Finance signature required for Purchases over	https://wmich.edu/logisticservices/purchasing/policies-procedures See Spending levels
Step 3:	FM T&M Contracts (Time and Materials) and Purchasing Purchasing will send email request for FM-105 to FM	Purchasing, FM Employees, Directors and Admin complete forms. Purchasing agents assist with T&M's renewals and rebids	https://wmich.edu/logisticservices/directory
Step 4:	FM internal process for FM-105 or FM-106 on projects and quotes over \$5,000. Fill out FM-105 or FM-106, secure two FM signatures, send to FM Business Operations (BOPS) for review with backup documents. Spending levels apply for signatures. Additional	FM Employee, Admin complete forms. BOPS reviews forms. Purchasing reviews forms and create contract/PO. Purchasing Policies and Procedures apply.	https://wmich.edu/facilities/administration (see organization chart) See Spending levels https://www.fm.wmich.edu/intranet/forms
Step 5:	Business Operations (BOPS) process: FM BOPS receives the forms and backup documents, the form is signed by BOPS and sent to Purchasing. Purchasing requests vendor's email on the form to send the vendor copy.	BOPS and Purchasing agents	Purchasing- Purchase Regs processing in BOPS Purchasing- FM Procedures for website
Step 6:	When on a project, BOPS adds the FM-105 or 106 information to the project on the TMA project encumbrance work order.	BOPS	
Step 7:	Purchase Order (PO) or contract is completed by Purchasing usually between two to three business days. A copy is sent to the FM employee (requestor,) the vendor and BOPS. A paper copy of the PO or contract is	Purchasing agents signs and emails copy to BOPS< the vendor and the FM employee (requestor), FM BOPS adds contract or PO number to project when appropriate and puts copy in file	
Step 8:	Contract or PO complete- FM employee and BOPS communicate the contract or PO is ready to close. BOPS contacts Purchasing. Hard copy of closed contract/ PO is	FM employee and BOPS. Purchasing is contacted.	WMU Retention Guidelines