Job Aid:

How to Record a Non-Contract or Incidental Purchase Previously Made (RPA)

This Job Aid shows how to:

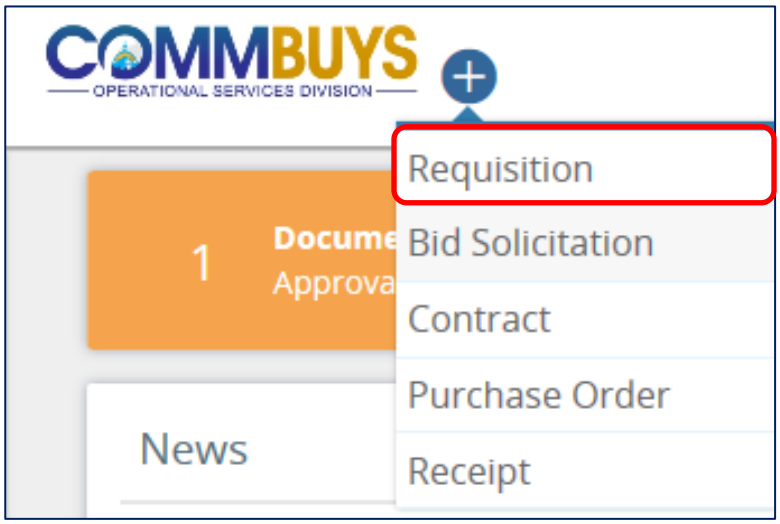
- Create an RPA Requisition in COMMBUYS

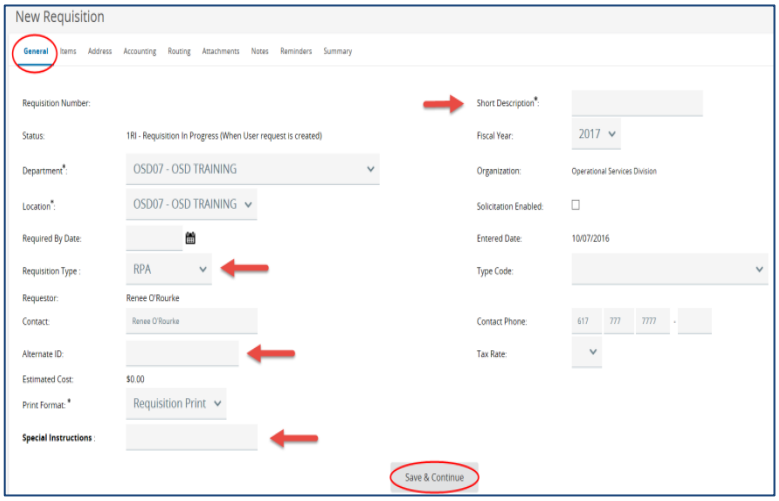
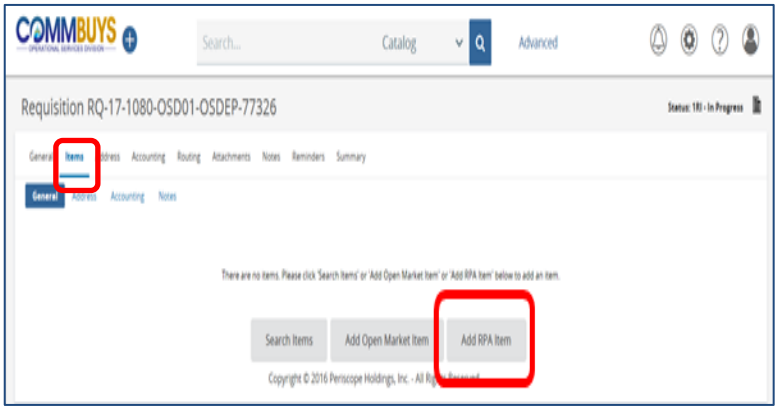
Of Special Note:

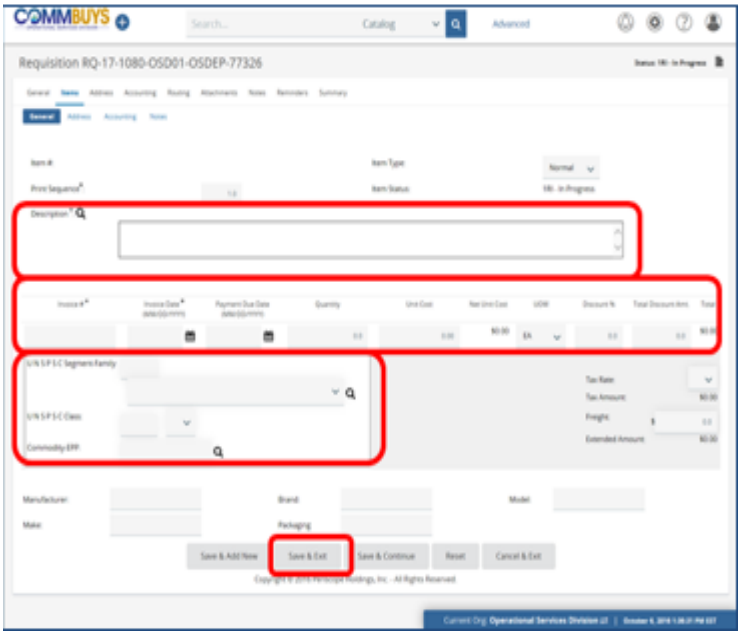
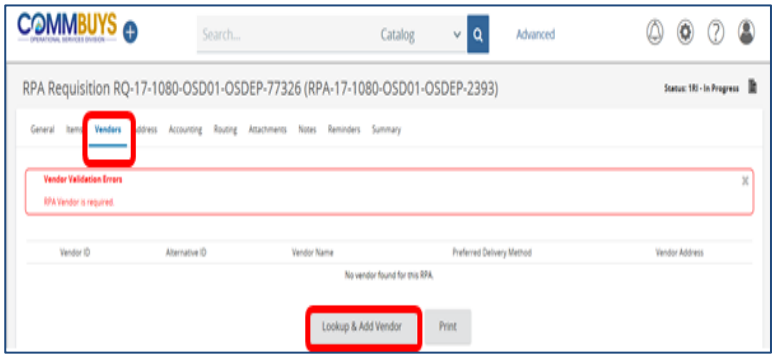
An RPA is a Request for Payment Authorization to be used after-the-fact for a purchase that has previously been made for goods or services not on an enabled statewide contract (SWC). These purchases are somewhat rare and must be approved by the appropriate authority at your agency prior to purchase. Purchasing through SWCs or a normal procurement is always the standard approach.

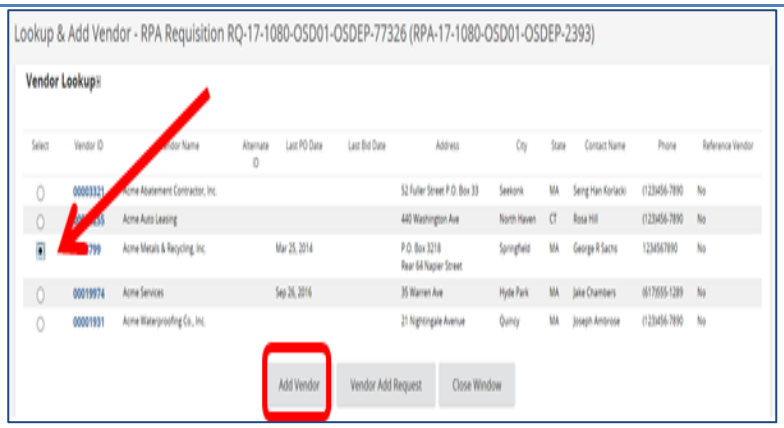
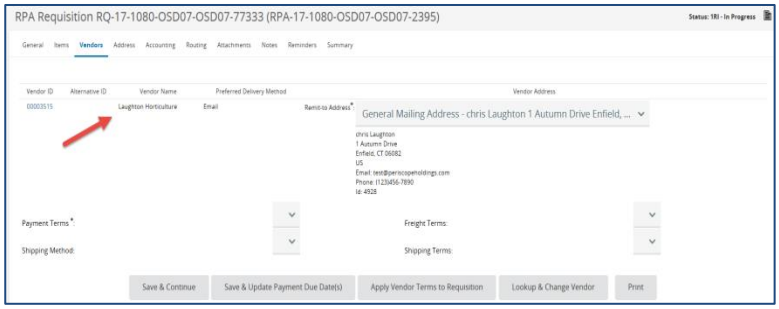
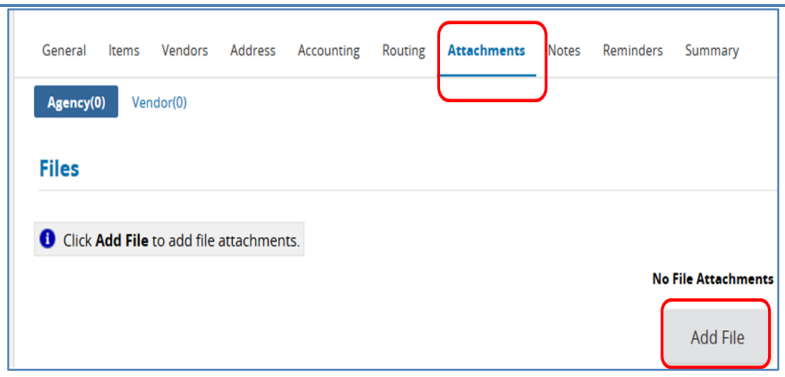
RPA Requisitions (as opposed to RPA Release Requisitions) in COMMBUYS record off-contract purchases when the normal procurement process is impractical due to impending need (emergency purchases) and for one-time incidental purchases up to $10,000.

If your purchase can be found on a SWC, you will want to create an RPA Release in COMMBUYS and you will follow the Job Aid titled: *How to Record a Contract Purchase Previously Made*.

Screenshot	Directions
	Step 1: Creating a New Document After logging in to COMMBUYS, click on the **Add Documents** (plus sign) icon at the top left of your home page.
	**Step 2: Selecting Requisition** Select **Requisition** from the dropdown menu.

Screenshot	Directions
	**Step 3: Entering Data in the General Tab** The **General** tab page displays. Fields with asterisks are required fields. The required fields for **Department, Location**, and **Print Format** default to values that may be changed if needed. 1. In the required **Short Description** field enter a searchable description of the purchased goods or services. 2. Click on the dropdown arrow next to the Requisition Type field and select **RPA** (do NOT select RPA Release). 3. **Alternate ID**: Enter information as required. This may include (but not limited to) data such as MMARS encumbrance ID or ERP/Accounting system transaction numbers for non-MMARS users. 4. When you are finished, click on the **Save and Continue** button.
	**Step 4: Searching for Items** 1. Click on the **Items** tab. 2. Click on the **Add RPA Item** button.

Screenshot	Directions
	**Step 5: Completing the Items Tab General Page** 1. When the page refreshes, enter: • Description of your goods or services • Invoice number based on the information on your vendor invoice (must be unique) • Invoice date • Payment due date (optional) • Number of items purchased • Unit cost of your item • Unit of measure (defaults to EA. for each) • UNSPSC Segment-Family Code and Class Code (use lookup to match the commodity or service purchased) 2. Click on the **Save & Exit** button. The screen refreshes to show the item saved successfully. 3. Check all information for accuracy before moving on.
	**Step 6: Clicking on the Vendors Tab** 1. Click on the **Vendors** tab. 2. Click on the **Lookup & Add Vendor** button. **NOTE:** The vendor must be registered in COMMBUYS. If not, then they should register immediately. If the vendor needs assistance with registration, please refer them to the OSD Helpdesk at 1-888-627-8283 or 617-720-3197.

Screenshot	Directions
	Step 7: Looking Up a Vendor 1. Enter the name of the vendor in the **Vendor Name** field. 2. Click on the **Find It** button.
 	**Step 8: Adding the Vendor** 1. In the **Select** column, click on the **radio button** next to the vendor name to select the vendor. 2. Scroll to the bottom of the page and click on the **Add Vendor** button. 3. When the screen re-displays, ensure that the vendor name is correct.
	**Step 9: Preparing the Attachment** Click on the **Attachments** tab and click on the **Add File** button.

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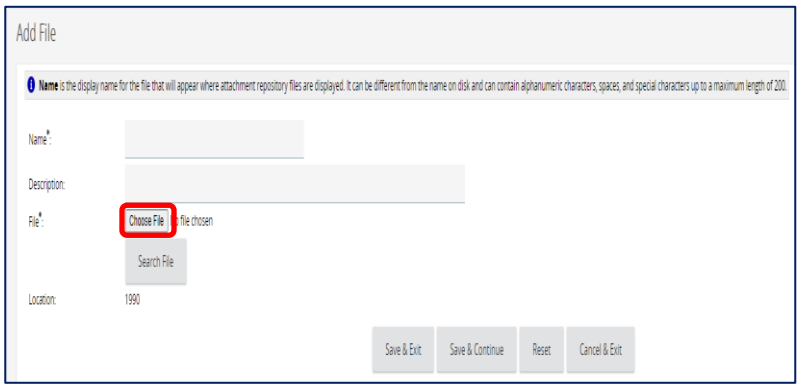
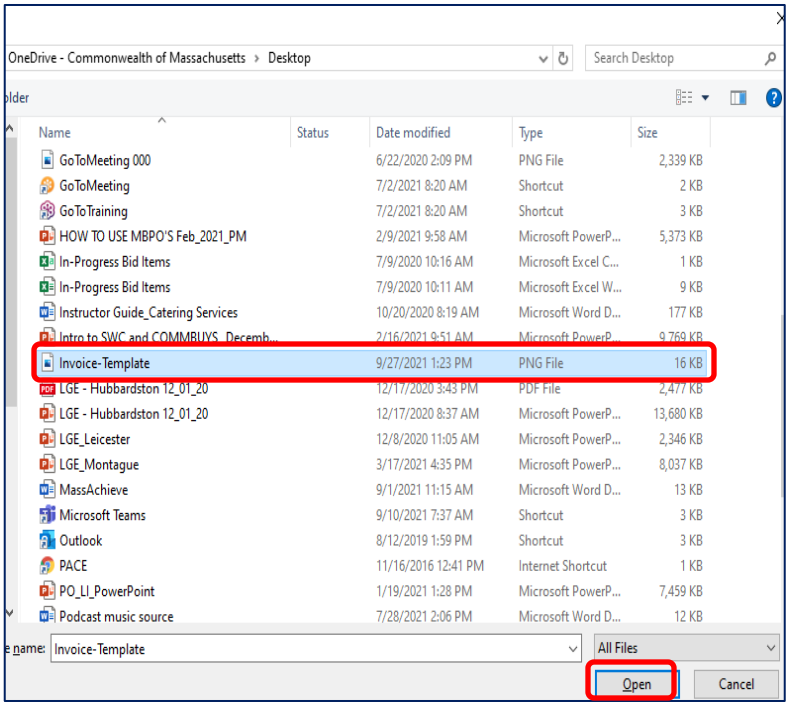
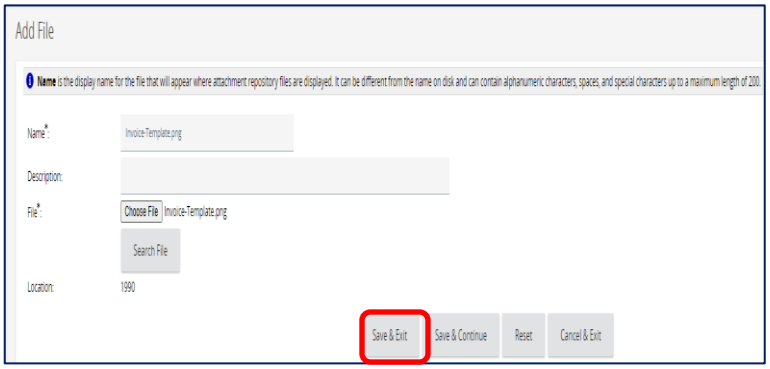
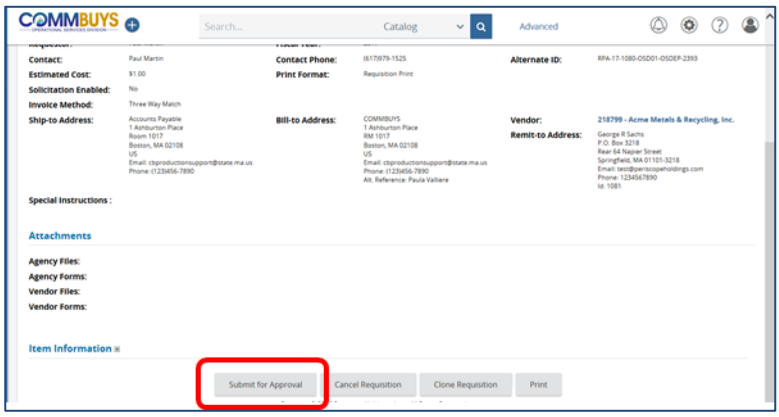
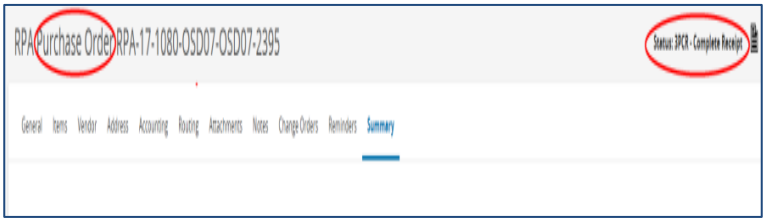
	**Step 10: Choosing the Attachment** Click on the **Choose File** button. **NOTE:** This button may be labelled **Browse** if using another browser.
	**Step 11: Attaching the Invoice** 1. Select the scanned copy of the invoice in the location where it was saved on your computer (e.g. documents file, desktop, flash drive, shared file, etc.). 2. Click on the **Open** button.
	**Step 12: Saving the Attachment** When the screen re-displays, click on the **Save & Exit** button.

Screenshot	Directions
	**Step 13: Submitting for Approval** 1. Click on the **Summary** tab. 2. Check all the information for accuracy and make corrections if necessary, by returning to the appropriate tab to make and save any needed changes. Then return to the **Summary Tab** 3. Scroll to the bottom of the page and click on the **Submit For Approval** button.
	Step 14: Saving the Approval The approval path displays or you're given the option to select the appropriate one. Click on the **Save & Continue** button to complete. **NOTE**: The RPA Requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete.
  	**Step 15: Viewing the Status** After approval, the Summary tab of the RPA Requisition will have the status of **Gone to PO**. The Summary tab of the RPA Purchase Order will have the status of **Complete Receipt**. **NOTE:** The vendor will not see this PO.