

Readiness Check-List for Business Managers	
	Y/N
A. Have you communicated the change in competitive bidding threshold to your department?	
B. Have you notified your department of changes in the petty cash policy?	
C. Have you communicated to your department that ERs over 120 days old will not be reimbursed, and that EMS will no longer allow the entry of these transactions?	
D. Are you using preferred vendors, wherever possible? Refer to Yale’s Buying Guide for guidance: http://buying-guide.yale.edu/	
E. Have you reviewed who in your department has access to the A/P Worklist?	
F. Have you reviewed, revised and communicated appropriate roles & responsibilities of individuals in your department who are involved in purchasing (SQ users, PCard holders, and other Initiators) with respect to new guidelines on preferred purchasing methods?	
G. Have you reviewed SQ access using BUG112A to determine correct initiators, preparers, approvers, and made appropriate adjustments (including potential reduction of number of SQ users)?	
H. Have you identified and requested vendor-set up for new SciQuest vendors in advance of purchasing activity (i.e. vendors that you have paid with an OK-to-Pay in the past)? SciQuest vendors can be found within SciQuest, and are also updated weekly here: http://www.yale.edu/procurement/eprocurement/activesuppliers.pdf	
I. Have staff that need it, attended in-class SciQuest training or used on-line SciQuest training materials?	
J. Have staff who purchase for sponsored projects attended the “ <i>What Research Staff Need to Know About Spending on Sponsored Projects</i> ” training? (coming soon)	
K. Have you set-up any additional VIP numbers needed for use in SciQuest? Are you using a meaningful naming convention for VIP numbers, e.g., include name of PI/Grant/project name?	
L. Have you trained initiators and preparers on routing invoices for central receipt in AP and handling vendor inquiries?	
M. Have you encouraged staff to obtain clear and accurate charging instructions from PIs and other Initiators prior to purchasing?	
N. Have you run the new BUG313a report to determine frequently used SciQuest Expenditure Types in your org to provide guidance to your users to improve charging accuracy?	
O. Have you discontinued the use of paper requisitions in favor of SciQuest requisitions? (With the exception of paper ‘DKP’ orders, which are still appropriate for services where a high volume of transactions are expected and the charging instructions will vary from order to order)?	
P. Have you reviewed PCard purchases in your department that were for supplies >\$2,000? Have you communicated to cardholders to use SciQuest for these transactions OR have you requested an exception with documented business reason via email to yems@yale.edu	
Q. Are you ensuring that Financial Reviewers are using the Activity Review Report for after the fact transaction review (you should expect an increase in SciQuest activity.)	