

Unified Procurement Services Team (UPST)

Boston F&A Meeting

March 2023



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

DRAFT-CONFIDENTIAL

Agenda

- UPST Fiscal Year End
- Automatic Contract Notifications

UPST Fiscal Year End

FY23 Year Planning Announcement

The end of FY23 is near! As we get closer, we will be sharing more information on UPST-specific dates. For now, please note the following:

- For executed contracts, **expenses are only accrued on the fiscal year (FY) the goods/services are received/rendered.**
- Coffee with UPST has been scheduled for April 6th 10am – 11am to discuss dates and show how to access and run your own queries. An invitation email will be sent out in the next few days.
- We will be back during April's F&A meeting to share the final FYE dates.

Automatic Contract Notifications

Review Your Contract Stakeholders

Within your contract, no matter the status, you will always have visibility to see who is listed as a stakeholder.

Use the “**Users and Contacts**” tab on the left side of your contract to see all the stakeholders listed.

eProcurement Setup	
Budget and Spend	
Applies To	
Goods and Services	
PO Clauses	
Comments	0
Communication Center	0
Users and Contacts	
Notifications	
Contract Family	

Users and Contacts	
Contract Managers [★]	Full control over this contract Johnson, Annette
Invoice Approvers	Approve associated vouchers <i>None</i>
Stakeholders	View this contract and receive notifications Fahlbeck, Susan

Stakeholder Notifications

Use the “**Notifications**” tab on the left side of your contract to see notifications sent to the contract stakeholders.

Advance Notice Settings

Leave a field blank to turn off that advance notice.

Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date	30		
End Date	90	60	30
Renewal Date	90	60	30

Spend Tier Notification Settings

Send Spend Tier Notification For PR spend PO spend Invoice spend

[Add Notification Tier](#)

Notification Tiers

Tier Type	Tier Amount	Description
Percentage	66 %	66% Invoice Spend
Percentage	90 %	90% Invoice Spend

Who should receive each notification type?

Notification Type	Contract Managers		Stakeholders	
	Contract	Work Group	Contract	Work Group
	✗	✗	✗	✗
Budget Exceeded	✗	✗	✗	✗
Percentage Tiers	✗	✗	✓	✗
Amount Tiers	✗	✗	✗	✗
Start Date - Advance Notice	✓	✗	✓	✗
Start Date Passed	✓	✗	✓	✗
End Date - Advance Notices	✓	✗	✓	✗
End Date Passed	✓	✗	✓	✗
Renewal Date - Advance Notices	✓	✗	✓	✗
Renewal Date Passed	✓	✗	✓	✗
Review Date Passed	✓	✗	✓	✗

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