

Unified Procurement Services Team (UPST)

Boston F&A Meeting

Tuesday, November 12, 2024



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law

Agenda

- UPST Organizational Changes
- Recipient Select Plus (RSP) Update
- Massachusetts Higher Education Consortium (MHEC) Quote Desk
- BuyWays Update: Supplier Status
- Reminders

UPST Organizational Changes

Leadership Changes

Departure Announcement



David Cho, Chief Procurement Officer (CPO), is leaving UMass for a new opportunity. As the University's first CPO, David achieved significant milestones during the first five years of the UPST. He established our strong systemwide procurement governance structure, facilitated efficiencies and savings for our campuses, and, most importantly, built a talented team of procurement and customer service professionals.



Leadership Changes

Promotion Announcements



Michael Durkin, the current Director of Strategic Procurement, will be promoted to the **University's Chief Procurement Officer**.

Prior to joining the University of Massachusetts President's Office, Michael was the Chief Procurement Officer for the University System of New Hampshire.

[LinkedIn](#) [Connect](#)



Brian Girard, our current Director of Procurement Operations, will become the new **Deputy Chief Procurement Officer**.

Prior to UPST, Brian was the Director of Purchasing at the UMass Chan Medical School.

[LinkedIn](#) [Connect](#)


Team Changes



Ruth O'Keefe is our new Senior Training and Communication Specialist at UPST.

Prior to UPST, Ruth worked in marketing and leadership roles in AI healthcare, digital marketing, and software development and training organizations.

[!\[\]\(eafc244b53721dd1ec133f0772f70fc7_img.jpg\) Connect](#)



Ashley Hunter, is transitioning from UPST to the University Information Technology Services (UITS).

Recipient Select Plus (RSP)



Recipient Select Plus (RSP)

Migration of Zelle-Enabled Individual Suppliers to Recipient Select Plus



Unified Procurement
Services Team

Dear Colleagues,

The University's Treasury & Unified Procurement Services Team (UPST) are pleased to announce that following the successful launch of Recipient Select Plus (RSP) by Bank of America, we are extending this service to existing UMass suppliers who previously used Zelle as their preferred payment method.

BENEFITS OF RSP FOR EXISTING ZELLE-ENABLED INDIVIDUAL SUPPLIERS

UMass benefits include a reduction in risk associated with the collection of sensitive data and payment details, along with an improved identity verification process.

Suppliers gain access to a single portal featuring multiple payment options to suit their needs, including Zelle, PayPal, and direct deposit.

WHAT DO I NEED TO DO?

Campus stakeholders will not need to do anything. UPST, in collaboration with Treasury, will work directly on updating supplier records in BuyWays and work with suppliers who experience any issues using the new RSP platform.

HOW CAN MY SUPPLIER ACTIVATE THEIR RECIPIENT SELECT PLUS ACCOUNT?

Once UMass initiates a payment for a supplier, the supplier will receive an email from UMass inviting them to create a RSP profile in the Bank of America RSP portal. From their profile, suppliers can choose their preferred payment method and provide the necessary payment details.

WHAT ELSE DO I NEED TO KNOW?

1. **November 2024:** The President's Office will send an email to non-RSP current Zelle suppliers notifying them of the exciting new offer.
2. **December 2024:** After UMass initiates payment, individual suppliers will receive an email invitation from UMass (gsare@umass.edu/recipientselect.com) inviting them to create a profile in the RSP portal.

CAN OTHER EXISTING INDIVIDUAL SUPPLIERS USE RECIPIENT SELECT PLUS (RSP)?

Yes. Domestic individuals who are registered suppliers in the UMass Supplier Portal (BuyWays) can log into the UMass Supplier Portal to add Recipient Select Plus as their preferred payment method. Within RSP they have the option to choose from Zelle, PayPal, and direct deposit as their preferred payment option(s).

After the successful launch of RSP by Bank of America, we are extending this service to existing UMass **suppliers who previously used Zelle as their preferred payment method**. You should have received a [notification email](#) last week. Campus stakeholders do not need to do anything.

. Benefits:

- Reduced risk associated with the collection of personal and payment details.
- Improved identity verification process.
- Single portal with multiple payment options for suppliers, i.e., Zelle, PayPal, and direct deposit.

Launch Timeline:

- **December 2024:** After UMass initiates payment, individual suppliers will now receive an email from UMass to activate their RSP profile.

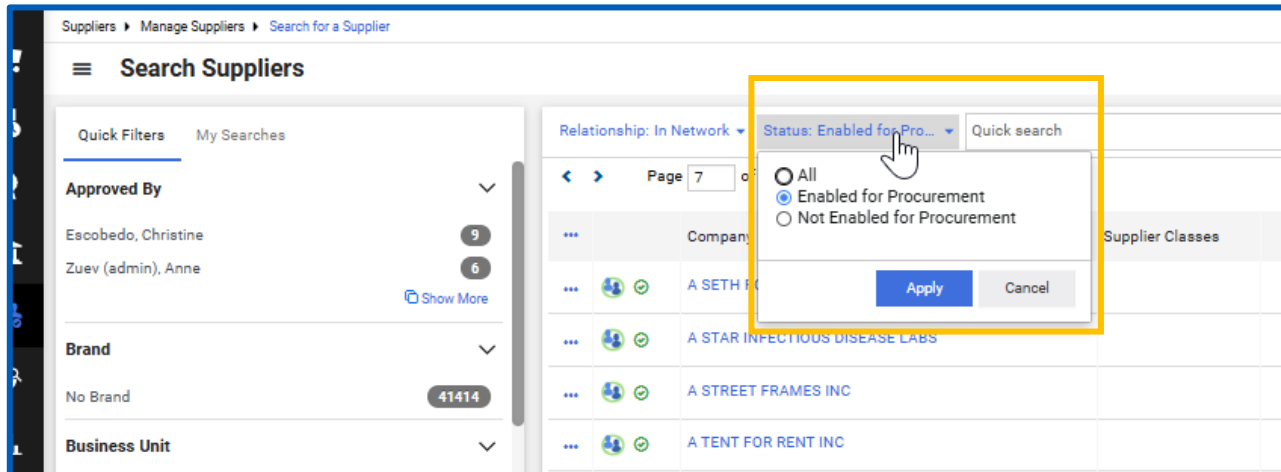
BuyWays Status Update



BuyWays Update (Live)

New Status for Active Suppliers

New terminology related to the Supplier Status has been launched as part of the Jaggaer Release. The icon for the suppliers is still same; however, the terminology has changed from “Active / Not Active” to **“Enabled for Procurement” or “Not Enabled for Procurement.”**



[View change announcement](#)

MHEC Quote Desk

We have collaborated with the Massachusetts Higher Education Consortium (MHEC) to provide discounts, quick access, and timely delivery for compliant and competitively priced purchases.

MHEC Quote Desk



Unified Procurement
Services Team



Need assistance identifying a supplier for a **particular item, product or service**?



Do you need **additional quotes** for your purchase to ensure you receive the best value and comply with policy?



Do you want to see if there is a **diverse or small business** available to supply your specific needs?

We want to help!!!

The UPST, working with the MHEC, has established a quote desk that can help you find the right contracted vendor.

Personalized Service

Save Time

Policy compliant

Updates your request regularly



Steps to Getting a Quote

1. Access the [MHEC Quote Request form](#)
2. Fill out the form and include any relevant information you have
3. An email will be sent summarizing your request after submitting the form
4. MHEC keep you updated on the progress of the quote via email
5. Once the quote is fulfilled, MHEC will send you the information from the suppliers

The screenshot shows the MHEC Quote Desk login form. At the top, there is a navigation bar with the phone number 1-413-GET-MHEC, links for Quote Desk, Service Desk, and Shop, a search bar with the text "Start searching now..." and a SEARCH button, and a LOGIN button. Below the navigation bar is the MHEC logo and a list of menu items: Start Here, Our Contracts, Members, Suppliers, About Us, Events, and Contact Us. The main content area is titled "Contact the MHEC Quote Desk" and includes a brief description of the service and a call to action. The form fields are: Member Entity (Required), Contact Name (Required) with sub-fields for First and Last, Contact Email (Required), Contact Phone (Required), Contract Number (If known), Product(s) Needed, Date Quote Needed (Required) with a date format of mm/dd/yyyy, and Date Product Needed (Required) with a date format of mm/dd/yyyy.

<https://mhec.net/login/quotedesk/>

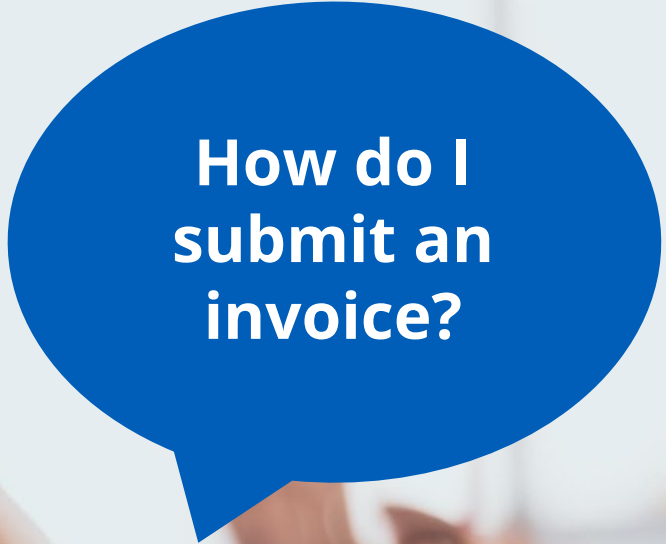
Reminders

Need Training?

The Training & Communications team is here to support your department's needs!

- Enter and submit a requisition
- Submit payments and invoices
- Create a contract request
- Submit a supplier request

Email us with the subject “My Dept Needs Training” and include your specific needs and preferred training dates.



How do I
submit an
invoice?



Got Questions? Get Help From Buddy!



Buddy is your go-to for UPST questions!

Found at the bottom right-hand corner of any UPST page, Buddy can assist with pressing inquiries such as:

- What is the status of my supplier's payment?
- Which commodity code do I use for ...?
- How do I start a contract/contract amendment?

Please be aware: Travel & Expense resides within the Employee Services Team (EST). Concur inquiries will guide you to the new T&E site.

Case Self-Service

Want to see your open cases or the status of all cases?

Check out [Case Management Self-Service!](#)

SUPPORT HOME PAGE KNOWLEDGE ARTICLES **VIEW YOUR CASES** CREATE CASE

View Your Cases

Cases

Recently Viewed ▾

1 item • Updated a few seconds ago

Search this list...

	Subject ▾	Contact Name ▾	Status ▾	Date/Time Opened ▾	Case Number ▾	
1	Dropbox Corrupt File Folder Detected - Ashley Hun...	Ashley Hunter	Closed	3/20/2024 9:12 AM	00274749	

Join us Every Tuesday at 11am!



The graphic features a blue background with the UMass logo and 'Unified Procurement Services Team' at the top left. The main text reads 'OFFICE HOUR' in large white letters, followed by 'COME WITH ALL YOUR QUESTIONS!' in yellow. A central photograph shows a diverse group of approximately 15 people smiling. Below the photo, it says 'EVERY TUESDAY 11AM-12PM' in white. At the bottom, there is a yellow 'REGISTER VIA ZOOM' button with a small URL below it: 'UMASSP.ZOOM.US/MEETING/REGISTER/T3UQF-ISPZ4TH9MSXFLDMB8KALVTCU8U8G3E'.

Don't miss out on our weekly office hour!

Members from the all teams are available to help answer your questions in breakout rooms:

- Accounts Payable
- Bank Card
- Contracts
- Requisitions & Purchase Orders
- Supplier Management
- Travel & Expense

[Register Here](#)

We're here to help you!



upst@umassp.edu



[Chat with Buddy](#)



[Connect with UPST](#)