

CPRM is launching a new monthly email to share key information, timely reminders, and important updates. Please feel free to forward this message to anyone who may find it helpful. Working together, our teams can make a meaningful difference during these tight budget times.

Year to date, CPRM has helped departments save a total of **\$685,000** through skillful negotiation, and we look forward to partnering with you to grow these savings. Engaging CPRM as early as possible is key to maximizing our collective success.

PCard Reminders

- Verify PCard transactions weekly to avoid card suspension or reporting issues.
- Ensure public purpose statements are clear and concise. This field has a character limit, so include only the essential purpose of the purchase and how it benefits the University.
- Send all PCard-related questions, including requests for PCard limit increases, to PCard@nau.edu.
- We encourage the use of PCards for purchasing goods. Services, however, typically require a Purchase Request and may involve a contract that must be reviewed by our Contracts team. If you have recurring services, please submit a [Policy Compliance Review](#) (PCR) ticket. Once approved, we may authorize those services to be paid using a PCard.

Vendor Forms

Vendor forms should be submitted to NAU-Purchasing@nau.edu rather than uploaded into a Purchase Request, as they contain personal identifiable information. Confirm vendor information is accurate (legal name, address, tax ID) to avoid setup issues.

Procurement Compliance

- Submit purchase requests before making a commitment. [Policy Title 2 Procurement Authority](#)
- Follow competitive purchasing thresholds. [Policy Title 3 Source Selection and Contract Formation](#)

Purchase Requests

- Engage Purchasing early for complex purchases, technology, or anything involving data, risk, and/or services.
- Notify our office of any upcoming projects that may require a solicitation so we can plan accordingly.
- Submit complete documentation (quotes, scopes of work, contracts) in your Purchase Request. Missing documents are the most common cause of delays.
- For additional assistance, contact Purchasing at (928) 523-4557 or email NAU-Purchasing@nau.edu or contact the individual your Purchase Request is assigned to.

ITS Software Checklist

ITS has requested that the individual requesting software follow the steps for acquiring software found on their [website](#). Instructions can be found by scrolling to the **“Steps to Acquire Software”** on that page.

Steps to acquire software

To ensure the above requirements are met, the following steps must be completed.

Step 1

Submit a purchase request

You'll use ServiceNow to submit a purchase request for the desired software.

Purchase requests for software acquisitions get routed through NAU contracts and purchasing so that the appropriate contract signature authority can agree to terms of service/conditions.

[Submit a Purchase Request >](#)

Step 2

Submit an ITS Checklist

You'll also need to complete the ITS Checklist—an OnBase form that asks questions about the desired software.

[Complete the ITS Checklist OnBase Form >](#)

Tip for success as you begin the process

- Define the scope of the software (individual, departmental, enterprise, educational, research, etc.);
- Review [Data Classifications](#) and know what data types the software will interact with;
- Reach out internally to departmental leadership and/or business analysts before beginning the process;
- Gather any necessary [HECVAT/VPAT/ACR/Vendor Question](#) forms, depending on the scope of the software;
- Respond to requests for additional information, if asked.
- View the status of your checklist [through OnBase](#).

Final steps

Once you complete the steps above, you'll standby for the necessary approvals and evaluations to be completed. Time required to process the Purchase Request and ITS Checklist varies depending on data and security factors, legally enforceable obligations, accessibility concerns, student and financial impact, and if the functionality is provided by an existing software.

We appreciate your attention to these reminders and updates and for your continued collaboration with CPRM team. We welcome your feedback and look forward to sharing more helpful information next month. For questions or suggestions, please email CPRM-Feedback@nau.edu.

CPRM Team