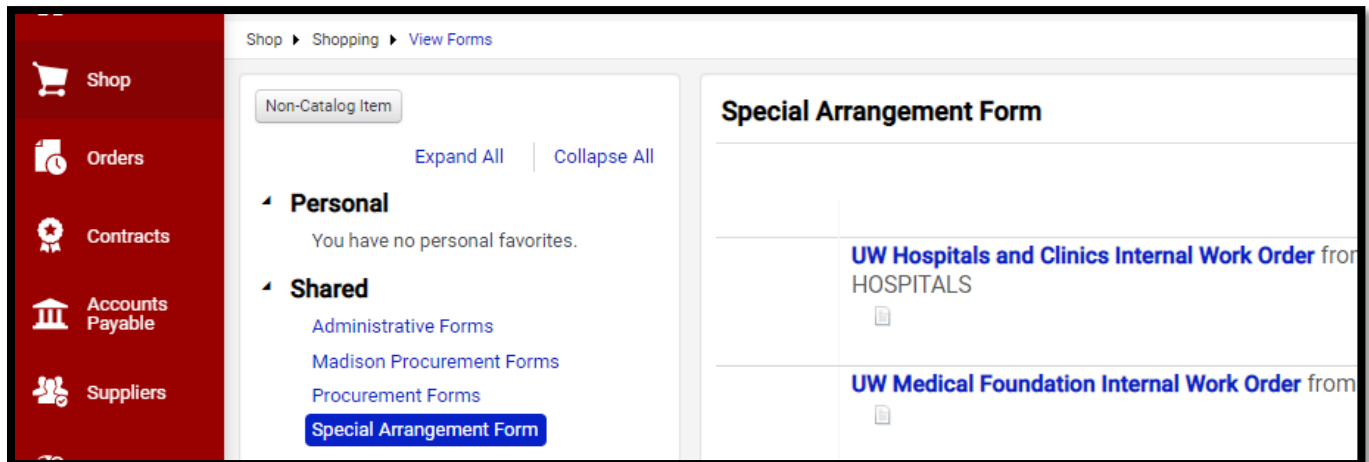


Internal Work Orders

This is the process to create an internal work order between SMPH and UW Hospital & Clinics (UWHC) OR UW Medical Foundation (UWMF).

The person creating the transaction in ShopUW+ must have the role of a requester. Email Heather Richter (hrichter@wisc.edu) if a role modification needs to be submitted.

- In ShopUW+, select View Forms – Special Arrangement Form – ***UW Hospitals and Clinics Internal Work Order*** OR ***UW Medical Foundation Internal Work Order***
 - Select the form for the Supplier that you are requesting service or product from
 - NOTE: If you are requesting supplies from UWHC or UWMF, please make sure that these shouldn't be ordered through ShopUW+
 - NOTE: If you are submitting the Internal Work Order for clinical trial patient billing, you will need to submit one IWO to UWMF for the PB (Professional Billing) charges, and one IWO to UWHC for the HB (Hospital Billing) charges.
 - UWHC will enter the PO#'s from each IWO into the 'funding string' field on their patient set-up. This will then give the patient billing specialists the information they need to accurately separate the monthly statement charges to bill against the correct POs in ShopUW+.



- When you select the Internal Work Order form you need, the supplier will auto populate as University of Wisconsin Hospitals OR UW Health (Medical Foundation)
 - The fulfillment address for the UW Medical Foundation Internal Work Order will auto populate to ACH-780 REGENT ST, STE 306; the fulfillment address for UW Hospitals and Clinics Internal Work Order will auto populate with ACH-301 S WESTFIELD RD STE 350
 - **YOU WILL NEED TO SELECT A DIFFERENT FULFILLMENT ADDRESS!** To select a different fulfillment address, which should correlate to the specific unit at UW Hospitals & Clinics or UW Medical Foundation, click on the pencil to the right of the address (see the next page for where to find the 'pencil' to edit the address).

- Once you select the fulfillment address, the email address that the PO will be sent to will appear in the 'Email' field of the 'Distribution Method' section. THIS IS EXTREMELY IMPORTANT TO THE PROCESS. All Internal Work Orders will be sent via email once approved in ShopUW+. If you don't see an email address, you will need to select a different fulfillment Address

Supplier Information

Existing Supplier

Supplier * UNIVERSITY OF WISCONSIN HOSPITA... X Q UN

Fulfillment Address **ACH-CENTRAL SUPPLY**
CENTRAL SUPPLY
635 SCIENCE DR STE 200
MADISON, Wisconsin 53711 United States

Distribution Method *
The system will distribute purchase orders using the method(s) indicated below:

Email (PDF Attachment) SCI@UWHEALTH.ORG

- On the entry screen, you will see the following fields:
 - PO Creation date – NOT REQUIRED
 - Start date/end date – not required, but can be used
 - NOTE: If you are entering an end date, it cannot be greater than the end of one Fiscal Year in the future (example, if the current date is 1/27/2023, the end date can't be any further out than 6/30/2024)
 - You should really only use these if the funding that is tied to the Internal Work Order will end
 - Total Dollar Amount – REQUIRED (you can no longer create these for \$1.00; please estimate the total of the services/supplies/etc that your department will purchase from UWHC or UWMF, using this Internal Work Order)
 - Product Description/Service Request – REQUIRED – this is the description of what service/supply you are requesting from UWHC or UWMF. This will appear on the PO that is emailed to the once approved in ShopUW+.

General Information

PO Creation Date 11/4/2022
mm/dd/yyyy

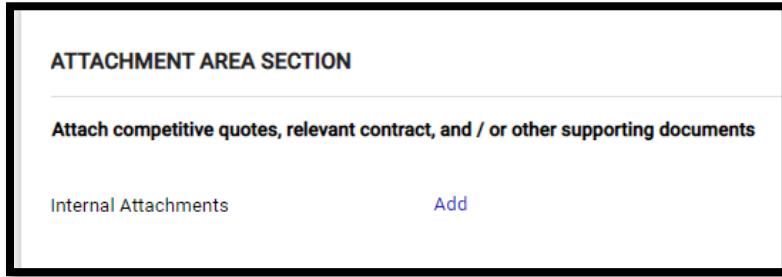
PO Start Date 12/19/2022
mm/dd/yyyy

PO End Date 12/19/2023
mm/dd/yyyy

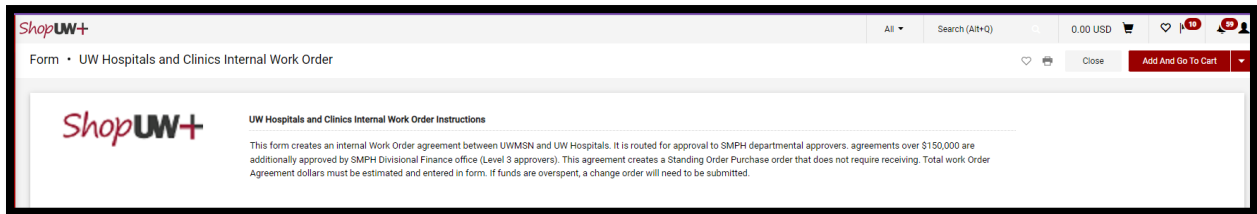
Total Dollar Amount * 5000.00

Product Description / Service Requested * Test UWH Internal WC
234 characters remaining expand clear

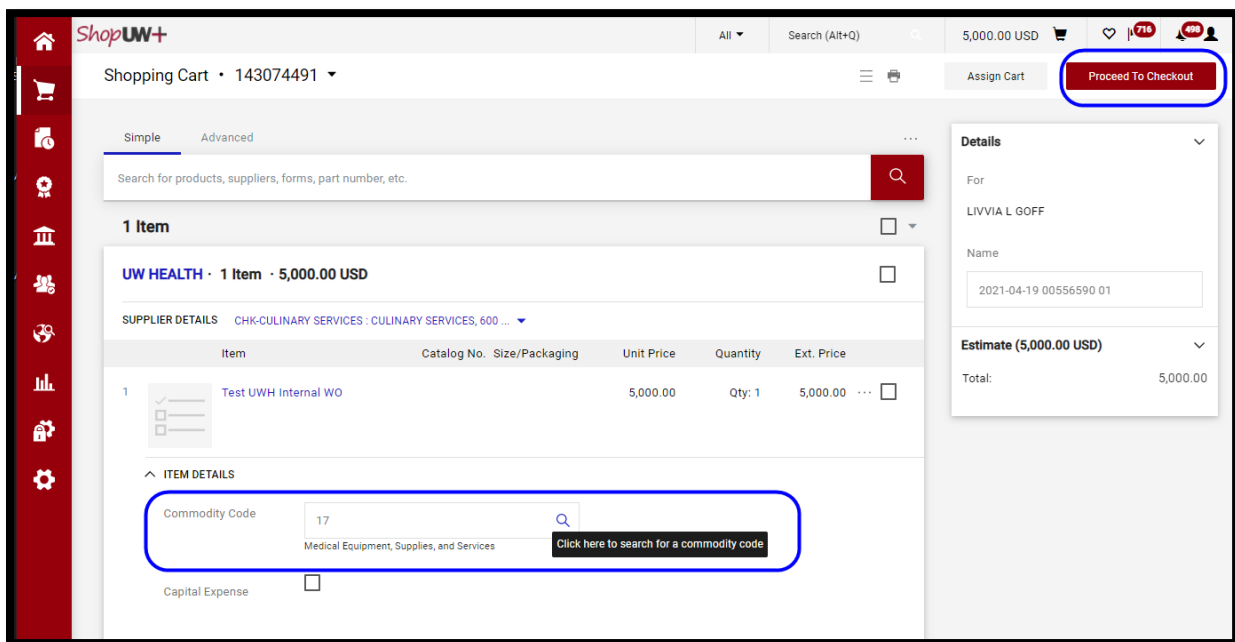
- Attachment – not required



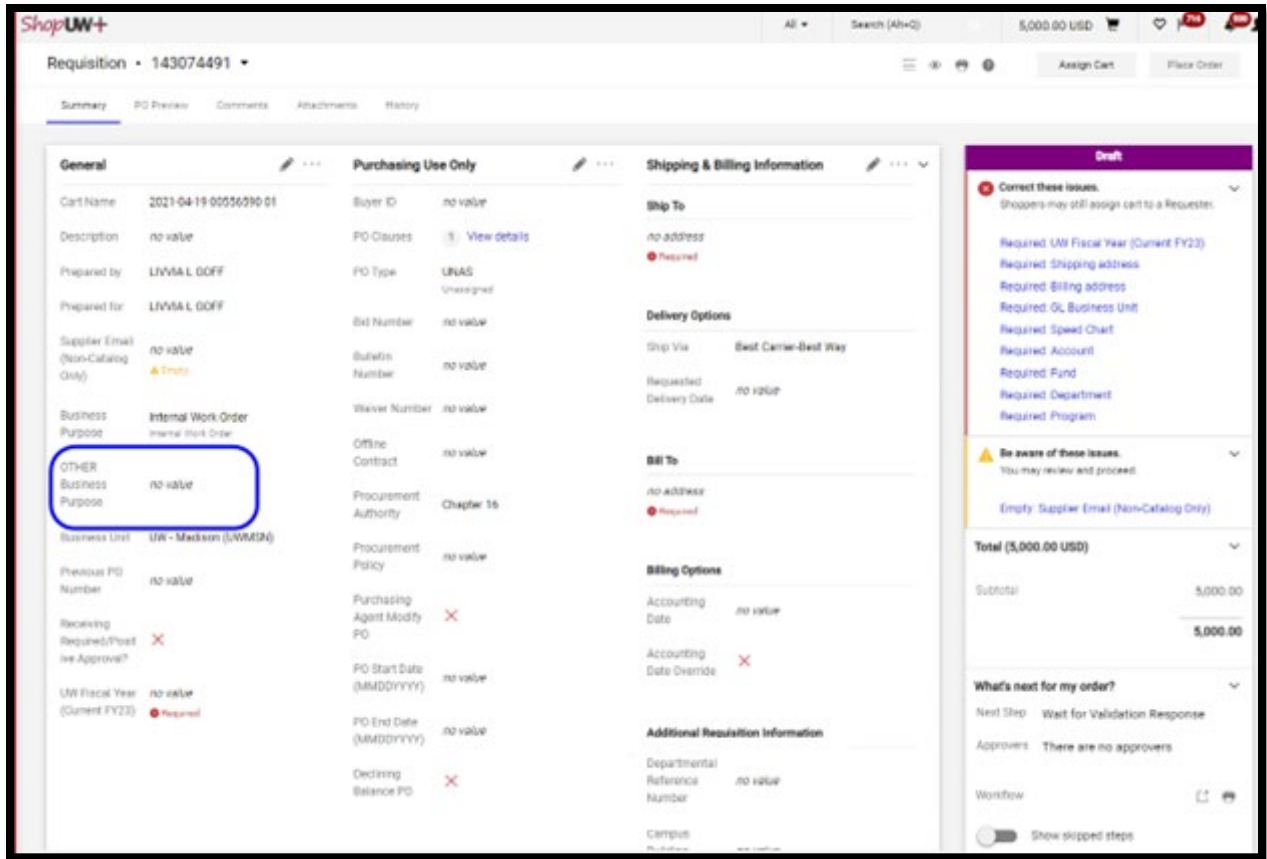
- Once you have the fields completed, you will 'Add and Go To cart'



- Once in the Shopping Cart, you will need to enter a commodity code
 - Select the Commodity code that most closely correlates to the 'Item' (Service/Supply) you are requesting

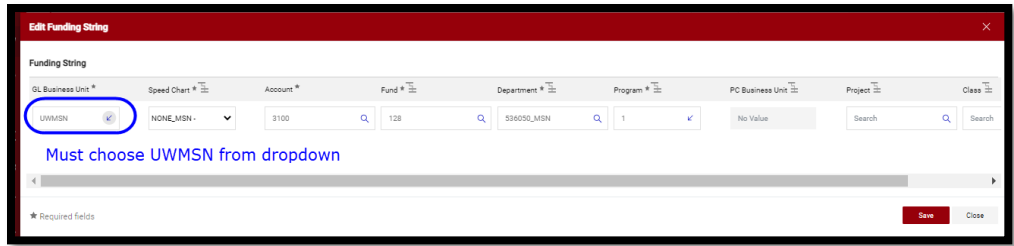


- Select 'Proceed to Check-out'
- Once you select 'Proceed to Check-out', the next screen you will see is the actual 'Requisition' input
 - The fields you need to update will appear in the Menu along the right-hand column in Blue

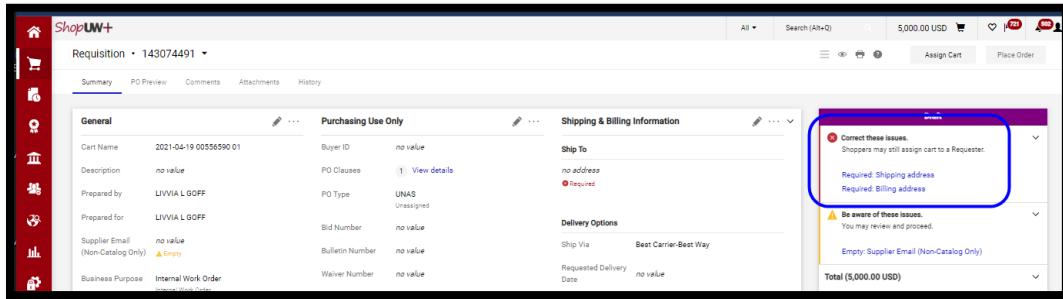


- Defaults can be set-up for Shipping and Billing information
 - NOTE: If you change or modify the shipping address, it will require an additional level of approval in ShopUW+ as it considers the change to be an ad-hoc address request.
- Supplier email can remain with yellow warning triangle
 - The email address that the PO will be sent to is determined based on the UW Health Supplier Address that was selected in the initial requisition screen.
 - Note: **If you enter an email address in this field, nothing will happen.** The ONLY email address that the Internal Work Order (PO) will get emailed to is the one associated with the Unit selected in the first steps
- Page down to enter the funding string
- You should use the actual account code (NOT 2650 like in the past) – the account codes list can be found on the Business Services Webpage (<https://businessservices.wisc.edu/accounting/codes/>)

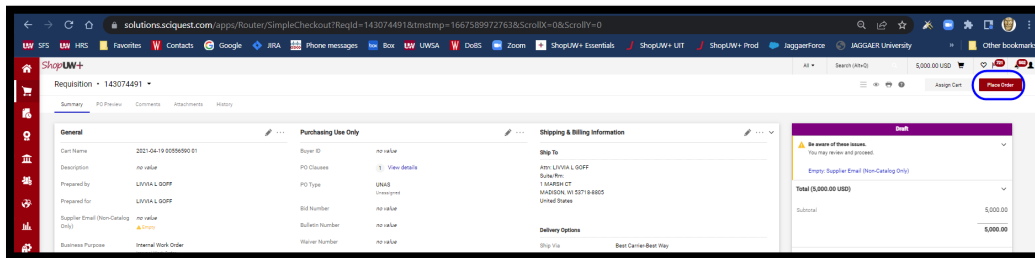
Funding String								
GL Business Unit						PC Business Unit		
Unit	Speed Chart	Account	Fund	Department	Program	Unit	Project	Class
no value	no value	no value	no value	no value	no value	no value	no value	no value
Required	Required	Required	Required	Required	Required			



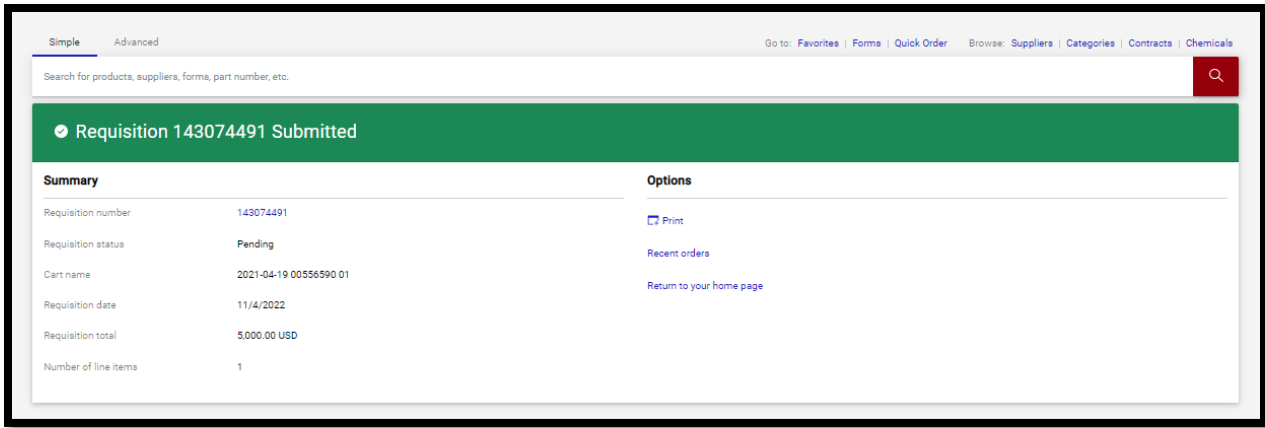
- Verify all required fields are populated



- Select 'Place order'



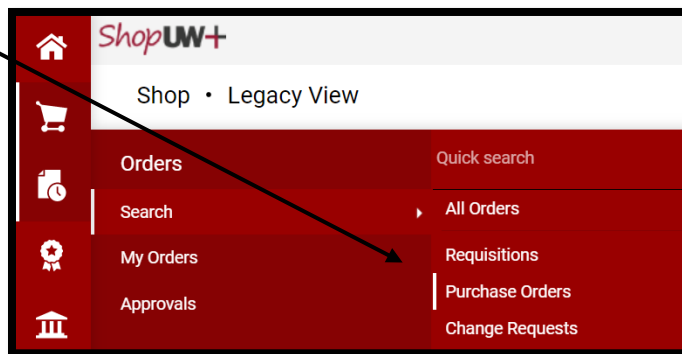
- You will then get a screen indicated that the Requisition has been submitted.



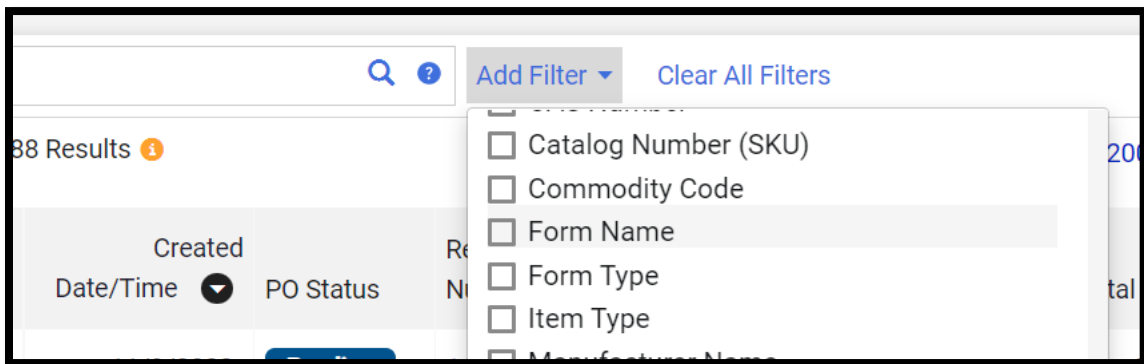
➤ Once the requester has submitted the requisition, it will route to the Department Approver to review and approve before the PO is created and emailed to the UWHC or UWMF email.

➤ If you want to see Internal Work Orders that you have submitted, you can create a saved search using the following steps:

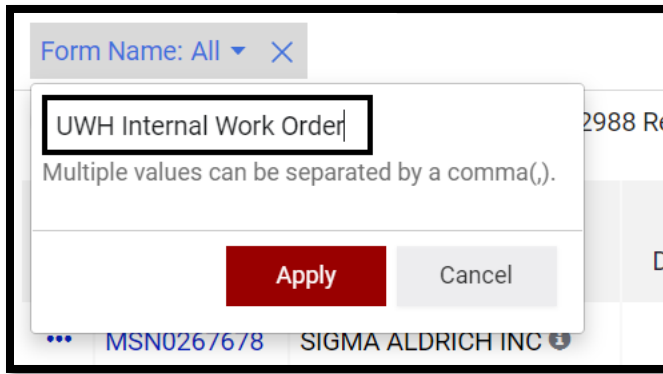
- Search
- Purchase Orders



- Select 'Filter' and then scroll down to 'Form Name'



- Type in UWH Internal Work Order, then Select 'Apply'



- A list will appear of the UWH Internal Work Order Forms that have been submitted
- You can then select other filters (Prepared By, PO Owner, Approved By, etc.)

Once the Requisition is approved, it will then get emailed to the email address associated with the fulfillment address selected. If you need to print a PDF of the Internal Work Order, you can search for the requisition in ShopUW

Any questions on the process can be submitted to Heather Richter, hrichter@wisc.edu.