

## Procedure 3201 PR.6

### VIP Accounts

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## 1 – The Role of VIP Accounts

### What Are VIP Numbers?

VIP numbers are used to facilitate communication of charging instructions to University-wide contract suppliers.

- A VIP number is a 10 character "alias" that is linked to a specific PTAE0 charging instruction (Project, Task, Award, Expenditure Type, Organization). The first 3 characters are always **VIP**, followed by 7 numbers.
- VIP numbers are linked to a generic VIP expenditure type, 822000. During the invoice payment process, the generic VIP expenditure type is converted to the expenditure type associated with the contract referenced on the invoice.

The Procurement Office requires that you use VIP numbers instead of PTAE0 numbers (or use a purchasing card if possible), when placing orders with vendors against university-wide contracts by phone, fax or on-line.

For more information regarding contract orders, see Policy [3201](#) General Purchasing Policy, and Procedure [3201 PR.1](#) Purchase Requisitions and Purchase Orders.

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### Assignment of VIP Numbers

A VIP number is assigned to one PTAE0 and one individual.

- VIP numbers are assigned only to University employees, or, in certain cases, to individuals designated as University agents.
- An individual can be assigned more than one VIP number if appropriate.

VIP accounts require maintenance as people move or as current projects and awards end and new ones begin (see Section 6).

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## Central VIP Administrator

The central VIP administrator is responsible for:

- assisting departmental VIP administrators
- providing training and information, as required
- performing program quality assurance
- responding to suppliers with VIP questions.

The central VIP administrator can be contacted at the Purchasing Department, 155 Whitney Avenue, Room 305, telephone 432-3227, fax 432-3280.

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## 2 – Designate Departmental VIP Administrator

### Departmental VIP Administrator

The department business manager or other responsible department administrator must assign a person(s) to the role of department VIP administrator. This person must be a Yale University employee, have a valid network ID, and have a computer that meets minimum Yale Administrative Desktop specifications.

The department VIP administrator is responsible for initiating, assigning, maintaining and terminating all VIP numbers for the department.

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### If No Department VIP Administrator Is Available

If no department staff member is available to serve as VIP administrator, or an administrator has not yet been trained, and an urgent need for a VIP number exists, an application for a single VIP number can be submitted to the central VIP administrator.

- The application form may be obtained from the [Quick Forms](#) web site.
- If more than one VIP number is required, a separate form must be submitted for each number.

The central VIP administrator will create VIP number(s) for the department based on information provided in the application.

Contact the central VIP administrator at 2-3227 for more information.

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## 3 – Attend VIP Administrator Training

### Mandatory Training

Department VIP administrators must attend a VIP administrator training course.

- A complete schedule of classes and registration instructions can be found at: [www.Yale.edu/xtrain](http://www.Yale.edu/xtrain)

During the course, each department VIP administrator will receive access to the VIP Manager responsibility. Upon completion of the course, the department administrator will be able to assign VIP accounts to department employees from his/her own desktop as described in Section 4.

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## 4 – Assign and Distribute VIP Numbers

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### Assign VIP Numbers

Use the Oracle VIP Manager responsibility to assign VIP numbers to employees in your department.

Each VIP number must always be associated with:

- a single PTAE0 charging instruction

- a specific employee or agent of Yale University

There is no limit on the number of VIP numbers that an individual can be assigned.

Caution should be used in assigning VIP numbers, since they require maintenance as individuals move or as current projects and awards end and new ones begin (see Section 6).

If desired, a VIP number can given an end-date using the **Inactive On** field. Once a VIP number has passed its **Inactive On** date, it cannot be used again.

You may want to make labels or cards for each VIP owner containing the individual VIP number, PTAE0 charging instructions and the VIP owner name.

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## 5 – Use VIP Numbers to Place Orders With Contract Vendors

### Order Directly From Contract Vendor

Use VIP accounts when ordering goods and services from vendors who have contracts with the University. (Many contract vendors also accept the University purchasing card.)

- Consult the [Purchasing](#) web site for a complete list of contract vendors with associated contract numbers.

Orders can be placed directly with contract vendors by phone, fax or on-line, or in person.

When you place your order, provide the vendor with the following information:

- contract number:
  - Each contract is associated with a default expenditure type that is charged when the invoice is processed. Vendors that have more than one type of commodity also have more than one contract and expenditure type.
  - Select the contract (PO) number that corresponds to the relevant expenditure type.
- VIP number
- your department contact name and phone number.

**Note:** Vendor invoices for contract orders must be sent to the Accounts Payable Department for payment. Emphasize this to the vendor when placing your order.

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### Commitments

If you wish to enter a commitment for a VIP order to cover the gap between the time the order is placed and the time the actual charge appears in the Data Warehouse, you may use Web Custom Commitments. See Procedure [1201 PR.5](#) for more information. To use Custom Commitments you must request access via [Xtrain](#).

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## 6 – Monitor Use of VIP Accounts

### Review Financial Reports

When invoices are processed for payment by Accounts Payable:

- The VIP number is replaced by its associated PTAE0 charging instruction.
- The VIP expenditure type, 822000, is replaced by the default expenditure type associated with the contract referenced on the invoice.
- Charges are posted weekly to the General Ledger.

Review financial reports regularly to ensure that the appropriate PTAE0s have been charged.

- If a purchase was made with a VIP number tied to an invalid PTAE0, the transaction will be appear in the AP PTAE0 Bounces project 1001283.

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Use journal entries to move charges to the correct accounts.

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## Monitor VIP Numbers

Use VIP Reports to monitor departmental VIP numbers. The department's VIP numbers can be viewed by:

- organization
- VIP owner
- PTAE0
- **Inactive On** date (end date).

Departmental business offices are encouraged to develop procedures for monitoring and updating the status of VIP numbers that meet their business needs.

- If your department has VIP numbers associated with grants, it is advisable to review the VIP accounts regularly to ensure that each VIP number is associated with a valid PTAE0.

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## Change or Deactivate VIP Accounts as Needed

- The department VIP administrator can:
- **change** a VIP account to associate it with a different PTAE0
- **deactivate** a VIP number, by entering the appropriate end date in the **Inactive On** field.

**If a VIP owner will no longer be using the VIP number** because of a change in duties, new position, or departure from the University, the VIP number should be deactivated.

**If a PTAE0 is no longer valid** because one or more of the components (Project, Task, Award, Expenditure Type, or Organization) has changed, been deactivated, or expired, the associated VIP number can be deactivated or associated with a different PTAE0, at the discretion of the department business office.

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