

PURCHASING OF OHS PRESCRIBED COMMODITIES IN COUPA PROCEDURE

SCOPE

This Procedure applies to workers involved in the purchase of prescribed commodities in Coupa for Science, Engineering, Medicine and Pharmacy faculties and non-faculty research platforms (excludes office-based platforms) at Monash University Australia campuses.

PROCEDURE STATEMENT

This Procedure sets out the requirements for purchasing prescribed commodities in Coupa.

Please note: If prescribed commodities are purchased or obtained by any other means, such as corporate credit card purchase, hire/loan, gifts/donation or items left by previous occupants, the requirements set out under section 2.2 of the [OHS Risk Management Procedure](#) still apply and must be adhered to.

1. Abbreviations

BI	Microsoft Business Intelligence
OHS	Occupational Health and Safety
OREI	Office of Research Ethics and Integrity
SARAH	Safety and Risk Analysis Hub
SDS	Safety Data Sheet

2. Risk Management

- 2.1 Operational managers must ensure that all relevant risk assessments have been completed prior to purchasing prescribed commodities in Coupa in accordance with the [OHS Risk Management Procedure](#).
- 2.2 Areas should consider limiting the number of workers who are authorised to purchase prescribed commodities.
- 2.3 Purchasers must reference or attach any relevant documentation in Coupa to support their purchase order for a prescribed commodity. Depending on the prescribed to commodity, these may include but are not limited to:
 - A number of a relevant risk assessment in SARAH;
 - Relevant permit or license reference number;
 - OHS Prescribed Activities Approval number in accordance with the [OHS Prescribed Activities and Permit-to-Work Procedure](#);
 - SDSs; and
 - Any relevant pre-purchase checklists e.g. [Chemical Pre-Purchase Checklist](#).

3. Identifying Prescribed Commodities

3.1 University Prescribed Commodities are:

- Drugs & Pharmaceuticals – purchases must be made in accordance with the [High Risk Scheduled Drugs and Poisons Procedure](#)
- Radiation – purchasing must be made in accordance with the [Using Ionising Radiation Procedure](#)
- Live Animals

3.2 Faculties that are involved in the purchasing of any materials listed as a University Prescribed Commodity, must establish approver groups in Coupa to monitor compliance with the respective University procedures.

3.3 Faculties are not required to set up approver groups for Live Animals, as approvals are managed by the Office of Research Ethics and Integrity (OREI).

3.4 Faculty Prescribed Commodities are identified at a Faculty level as requiring approval and monitoring. Schools and departments may develop local business rules, which establish specific requirements related to purchase, including any exemptions. For example, a department may determine based on the level of risk, that their purchasers are not required to seek approval when purchasing a particular item from the Faculty Prescribed Commodity list.

4. Establishing Approver Groups

4.1 Heads of Faculties/Schools/Departments must ensure that:

4.1.1 Approver groups are established to monitor Coupa purchases of prescribed commodities in their area;

4.1.2 Local business rules are developed that specify the approval requirements at School/Department level.

4.2 Operational Managers must complete the form to request that approver groups are set up for their area for specified prescribed commodities.

4.3 Commodity Approver groups should include local safety officers, specialty safety officers and at least one subject matter expert for the relevant materials for which purchasing approval is being sought.

5. Purchaser's Acknowledgement

5.1 Purchasers of prescribed commodities are required to read the Prescribed Commodities Purchaser Acknowledgement Statement and acknowledge that they have understood the requirements outlined on the [Coupa User Request Form](#) prior to purchasing prescribed commodities.

6. Approving Purchase Requests

6.1 Commodity Approvers must review all purchase requests that are flagged for their approval in Coupa and must ensure that:

- All the appropriate documents have been submitted in accordance with any local business rules or as set out by relevant University procedures (e.g. [High Risk Scheduled Drugs and Poisons Procedure](#)); and
- Any relevant persons have been consulted.

6.2 Commodity Approvers may request that the purchaser provides any additional documentation before approving their purchase request.

7. Monitoring of Purchase Requests

7.1 Approvers must monitor local purchasing activities via a Prescribed Commodity Approval report in Power BI at a frequency that is practicable for the area. Requests to set up access to the Prescribed Commodity Approval report for the area should be submitted to the [Financial Operations team](#).

7.2 Areas should establish a suitable process and rules whereby Coupa access is revoked if users fail to comply with this procedure.

8. Roles and Responsibilities

8.1 Heads of Faculties/Schools/Departments

- Responsibilities of Heads of Faculties/Schools/Departments are described in the relevant sections of this procedure.

8.2 Performance Supervisors are responsible for ensuring:

- That purchasers have met the requirements set out in section 5 prior to being allowed to purchase prescribed commodities.

8.3 Operational Managers

- Operational Managers must ensure that local business rules are developed and communicated to the relevant purchasers.
- Other responsibilities of Operational Managers are described in the relevant sections of this procedure.

8.4 Commodity Approvers are responsible for:

- Checking that the purchasers have provided all the required documentation and information in Coupa to support their purchase request as specified in relevant OHS procedures for University Prescribed Commodities or local business rules for Faculty Prescribed Commodities;
- Seeking further information from purchasers to facilitate approval of purchase request;
- Approving purchase requests in Coupa;
- Managing users within the commodity approver groups; and
- Periodically monitoring local purchasing activities via the Prescribed Commodity Approval report.

8.5 Purchasers are responsible for:

- Identifying all the required documentation and information required to be submitted for approval in Coupa to facilitate their purchase request; and
- Ensuring that OHS risks associated with the purchase are managed in accordance with the [OHS Risk Management Procedure](#) prior to placing a request in Coupa.

8.6 Financial Operations are responsible for:

- Setting up local approver groups for prescribed commodities in Coupa;
- Setting up Prescribed Commodity Approval reports for approvers; and
- Granting access to Coupa via the [Coupa User Request Form](#).

9. Tools

9.1 The following tools are associated with this procedure:

- [Chemical Pre-Purchase Checklist](#)
- [Coupa Support portal](#)

10. Records

10.1 For OHS Records document retention please refer to:

- [OHS Records Management Procedure](#)

DEFINITIONS

Key word	Definition
Commodity Approvers	Workers who have been assigned responsibility by the Head of the Area or a relevant Operations Manager, to approve purchase requests for prescribed commodities submitted in Coupa.
Coupa	A cloud-based platform used at Monash University to purchase goods and services from Monash approved suppliers.
Local Business Rules	Documented local requirements and procedures established by Faculty/School/Department that detail the commodities requiring approval at a local level. Local business rules must identify the relevant information that purchasers are required to provide for approval to support their purchase request.
Prescribed Commodities	Materials that have been determined at University or Faculty level as requiring material release in Coupa. Schools and Departments can set up local business rules to exempt local purchasers from needing approval for Faculty-specified commodities depending on local operational needs. University prescribed commodities cannot be exempt from the approval process.
Purchasers	Workers who have been given responsibility and authority to purchase prescribed commodities in Coupa.

GOVERNANCE

Parent policy	OHS&W Policy
Supporting procedures	Monash University OHS documents High Risk Scheduled Drugs and Poisons Procedure OHS Prescribed Activities and Permit-to-Work Procedure OHS Records Management Procedure OHS Risk Management Procedure Using Ionising Radiation Procedure
Supporting schedules	N/A
Associated procedures	Australian and International Standards ISO 45001:2018 Occupational Health and Safety Management Systems
Related Legislation	Occupational Health and Safety Act 2004 (Vic)
Category	Operational
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DOCUMENT HISTORY

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1.0	July 2022	Purchasing of OHS Prescribed Commodities in Coupa Procedure, v1.0