

PURCHASING GUIDELINES & ePROCUREMENT REQUESTOR TRAINING

REVISED 8/30/2022



DISCOVER YOUR **OPPORTUNITIES**

**Information contained in this training was provided by:
The Valdosta State University Department of Procurement**



Today's Objectives

At the end of today's training, Requesters will have a high level of understanding of:

- Federal, State, USG, & VSU Procurement Policies & Procedures for:
 - Making purchases
 - Contract Review and Execution
 - Conducting Solicitations
 - Submitting requisitions in eProcurement
- Requester and Departmental Responsibilities
- Procurement Tips & Resources



Introduction

Contact Info

- Phone: 229-333-5708
- Fax: 229-333-7408
- Email: procurement@valdosta.edu
 - itpurchasing@valdosta.edu
 - contracts@valdosta.edu
 - pcard@valdosta.edu
 - fuelcard@valdosta.edu

Location

- University Center, Entrance 7
- Office Suite 1200
- Location that previously housed the Office of Centralized Advising.

VSU Procurement Website:

<http://www.valdosta.edu/administration/finance-admin/financial-services/procurement/>

VSU IT Procurement Website:

<https://www.valdosta.edu/administration/it/procurement/>

VSU Financial Services Forms:

<https://www.valdosta.edu/administration/finance-admin/financial-services/forms/>



VSU's Dept. of Procurement

The Office of Procurement is part of Accounting & Procurement (aka Financial Services) and is responsible for supporting the campus community with the following:

- **Purchasing Policy & Procedures**
- **Use of eProcurement** *via PeopleSoft Financials portal*
- **Supplier Onboarding** *via Payment Works onboarding tool*
- **Purchasing Card/P-Card Program** *via Process Plan & WORKS portal*
- **Statewide Contracts** *Interpretation of & Use*
- **Contracts** *Review, Negotiations, & Execution*
- **Holman** *Formerly ARI, State contracted vehicle maintenance program*
- **Fuel Card Program** *via WEX portal & State Office of Fleet Management*
- **Risk Insurance**



Buyer Responsibilities

- Ensure all purchases comply with all Federal, State, BOR/USG and VSU policies.
- Assist End Users with ePro, Payment Works, and Interpreting Statewide Contracts
- Review and process Requisitions that are entered by Requesters through eProcurement into Purchase Orders, aka POs.
- IT-related purchases include software, online licenses, hardware, or cloud services that connect to a VSU computer, VSU network, or VOIP device.
 - If you are unsure if your request is IT related, email itpurchasing@valdosta.edu for a determination.
 - Quotes for IT purchases must be obtained by emailing itquotes@valdosta.edu
- Find your Department's Buyer here:
 - <https://www.valdosta.edu/administration/finance-admin/financial-services/procurement/find-a-buyer.php>



How to Make a Purchase

- **GaFirstMarketplace:** Online catalog of Mandatory and Convenience Statewide Contracted items.
 - Catalog is housed in PeopleSoft Financials portal
 - Completely automated work flow
 - Does require Buyer review after Budget Manager review
 - Order is submitted directly to the Supplier after Req is fully approved & reaches valid budget check
- **P-Card:** Point of sale payment – charge is made at Supplier location
 - Requires pre-approval via ProcessPlan before transaction can be made for each individual transaction
 - Must be a permissible transaction per State pCard and VSU pCard policy
 - Pre-approvals require
 - Description & Justification of purchase,
 - Name of anticipated Supplier,
 - Anticipated dollar amount of transaction,
 - Budget Approver name/email,
 - Cardholder name/email,
 - Formal quote or screenshot of online cart showing Supplier pricing

VSU pCard Policy:

<https://www.valdosta.edu/administration/finance-admin/financial-services/procurement/purchasing/documents/vsu-purchasing-card-procedures-.pdf>



How to Make a Purchase Cont.

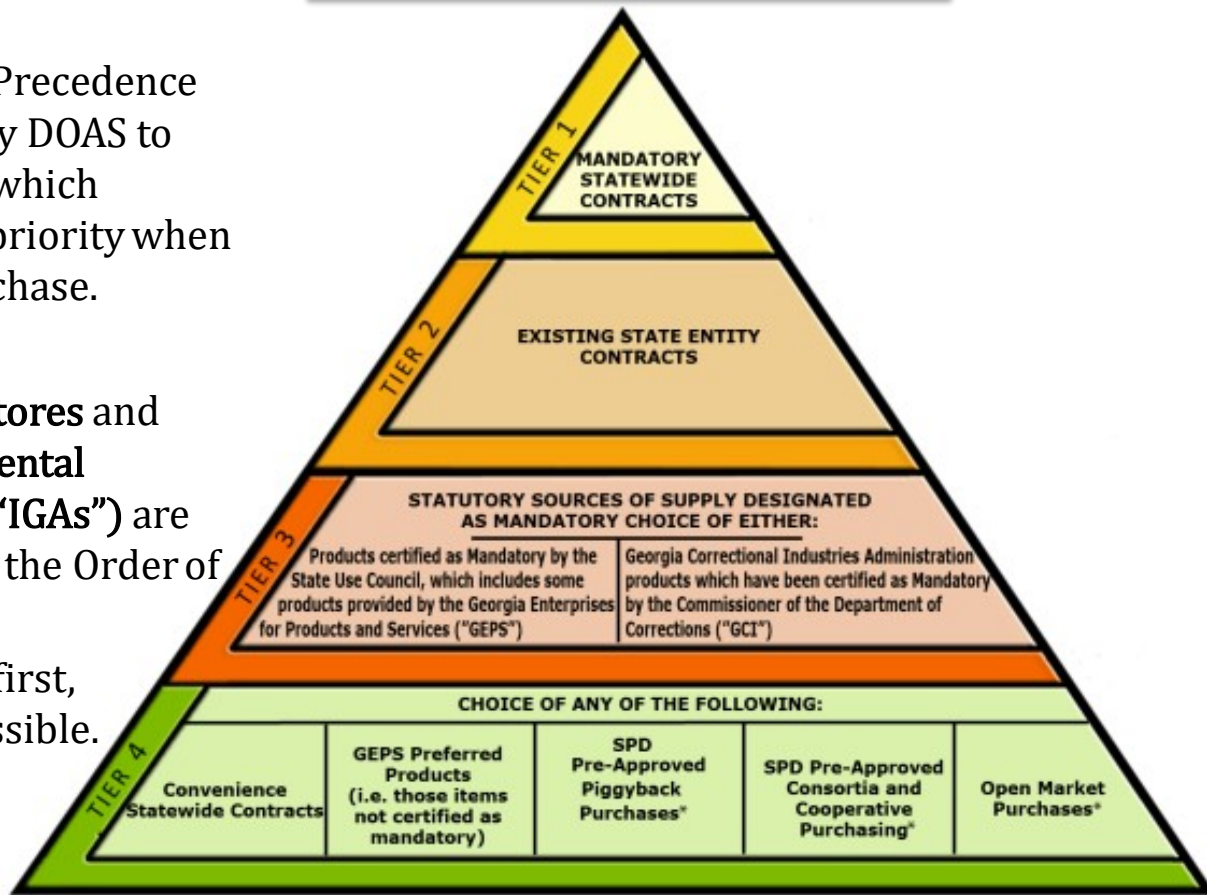
- **Special Item Request:** Items that are not available in GaFirst Marketplace; aka Open Market
 - Open Market Purchases are goods/services not available from another VSU Department, items not on Statewide Contract, all purchase requests for service related purchases, and all Furniture related purchase requests
 - Requires Buyer review and processing
 - Requires documents such as, but not limited to, a current formal quote or service agreement
 - Requires Supplier to be active in Peoplesoft Financials or a Payment Works invitation to be sent
 - *Buyers authorizes the Supplier to fulfill purchase via a signed PO – NOT the department*
- **Fuel Card:** Purchasing fuel for State owned vehicles and equipment:
 - If you do not have a Fuel Pin, a Fuel Card application must be completed and submitted to fuelcard@valdosta.edu in order to be assigned a Fuel ID
 - Your assigned Fuel ID is tied to the budget chart string designated on the submitted application
 - Physical Fuel Cards are kept in their assigned State vehicle
 - Fuel IDs are not to be shared with others, State employees or otherwise
- **Fuel Card Application:**
<https://www.valdosta.edu/administration/finance-admin/financial-services/procurement/purchasing/documents/fuel-card-agreement-and-application-form-03082019.pdf>



Order of Precedence

VSU Central Stores or IGA

- The Order of Precedence was created by DOAS to demonstrate which sources take priority when making a purchase.
- VSU Central Stores and Intergovernmental Agreements (“IGAs”) are not subject to the Order of Precedence.
 - Use these first, if at all possible.





VSU Central Stores

- Stocks standard white 8.5" x 11" copy paper
- Standard copy paper **MUST** be purchased from Central Stores.
 - Located here: www.valdosta.edu/central-stores.php
- Standard copy paper that is purchased in GAFirst Marketplace will result in the **ENTIRE ORDER** being rejected at the time of delivery to Central Receiving.
 - Any other items on the rejected delivery will need to be re-ordered by the Requestor.
 - Requestor must request Procurement to cancel the associated PO in order to free up funds for the re-order of rejected items

For more information contact Central Stores at x5958.



Intergovernmental Agreements

- **Intergovernmental Agreements (aka IGAs):**
 - Contracts/purchases between government entities.
 - States Agencies & Programs, State Funded Higher Education Institutions, and Local Municipalities.
 - Does NOT include the Federal government.
 - Does not require competitive bidding.
 - Does not require Contract Review.
 - Available for Piggy Back purchases
 - Provides greater purchasing power resulting in savings from bulk purchases among more than one agency/institution



VSU Amazon Business Prime

- VSU Amazon Business Prime account provides Prime discounts and delivery times.
- To purchase through the Amazon Business Prime account:
 - Amazon is now available on GAFirst MarketPlace, this is not covered by a Convenience or Mandatory Contract
 - Your VSU email address cannot be tied to an existing Amazon account to use the Punch-out catalog through GAFirst MarketPlace
 - Confirm items are not on a Statewide Mandatory Contract.
 - Confirm that items are either Prime or fulfilled by Amazon
- All Amazon orders are required to include a business justification regardless of the items being purchased.
- Procurement will review the requisition and provide Buyer approval after Budget Manager approval is complete
- Google Chrome cannot be used to order from Amazon. Mozilla Firefox is the preferred browser.

Important Note: Price changes and availability between the time of requisition creation and final order submission may result in parts or all of the order not being accepted by Amazon. All required approvals **MUST** be completed for Amazon requisitions within 72 hours or the requisition will need to be recreated.



Solicitation Process

- Purchases of \$25,000.00+ and are not on Statewide Contract or IGA, must be competitively bid.
- 3 types of solicitations satisfy the state's requirement:
 - Request for Proposal (RFP)
 - You know the outcome needed, but want bidders to tell us how to achieve it
 - Price is not the top concern
 - Request for Quote (RFQ)
 - You know what you want and lowest price is top concern
 - Sole Source Purchase
 - Sole Sources are very rare as they limit competition

Contact Procurement
AS EARLY AS POSSIBLE

if the anticipated purchase request is \$25,000.00 or more to determine what type of solicitation, if any, is required.



Requesting Contract Approval

Allow least 30 days for review & negotiations

- STEP 1: Confirm that no Statewide or Agency contract will suffice
- STEP 2: Read contract. Does it meet the need and is it within your price point?
- STEP 3: Verify there is enough funding for the entire length of the initial term.
- STEP 4: Complete Monetary Contract Approval Routing Form.
- STEP 5: Submit Routing Form and Contract/Agreement to contracts@valdosta.edu

This will kick off the **Contract Review Process**.

Contracts are reviewed by Procurement - as well as Legal Affairs, HR, Creative Services, and IT as applicable.

Once fully executed an email notification will be sent to the Requester & Budget Manager that an ePro Special Item Request can be submitted for Budget Approval.

Be sure to attach all Contract documents to the Requisition



Security & Immigration Contractor Affidavit

- State and Federal law requires VSU to confirm that any Supplier performing a service for or on behalf of VSU, where there is human involvement/interaction, are enrolled in the Federal eVerify program.
- This requirement applies to “*any physical performance of labor or services for a public employer using a bidding process or by contract wherein the labor or services exceed \$2,499.99...*” (O.C.G.A. 13-10-90)
- Purpose of eVerify Affidavit is to ensure that all services provided are through and by individuals who are authorized to work in the United States.
- Requirement does not apply to any services performed in another country.
- For an Individual/Independent Contractor – a copy of a Government issued ID will satisfy
 - Such as a drivers license, passport, work visa, etc



Requester Responsibilities **BEFORE** Submitting an ePro Request

- Depending on the method of purchase:
 - Work with department to:
 - Identify the need(s)
 - Find a Source/Supplier following the Order of Precedence
 - Confirm adequate funding
 - Notify Procurement of anticipated purchase requests of \$25K+;
 - Submit documents for Contract Routing/Approval if applicable;
 - Send Payment Works Invitations to Suppliers not already established;
 - Requisitions can be submitted for approvals regardless of the Supplier's registration progress in PaymentWorks.
 - Make sure quote is valid and not expired
 - If using an independent contractor, submit MSA and DOS to HR for review and approval



Special Item Request

- **Items/services not available through VSU or a State Agency/Institution**
 - VSU provides Print Shop, Creative Services, Central Stores, Recycling & Employee Development
- **Items that are not available or have no price listed in GaFirst Marketplace**
- **Required additional actions & documents (as applicable):**
 - Valid quote
 - Must not be expired or be more than 30 days old, whichever is greater
 - Does not reference Company terms & conditions or the Company agrees to VSU's terms
 - Completed Service Agreement & HR-Approved Determination of Status Form:
 - For services provided by an individual; who agree to VSU terms & conditions



Special Item Request Cont.

Required additional actions & documents cont. (as applicable):

- **Security & Immigration Contractor Affidavit:**
 - Services provided by a Company or Independent Contractor that totals \$2,500+ per service.
 - Required for each service/job regardless of when the last services was provided
 - For an Individual/Independent Contractor – a copy of a Government issued ID
 - Such as a drivers license, passport, work visa, etc.
- **Fully Executed Contract** from VSU Contract Officer; to include Contracts resulting from a successful bid award



Submitting an ePro Request

- Enter the requisition into eProcurement
 - Notate in line 1 comments if/when a Payment Works invitation was sent to the supplier
- Attach required documents, as applicable, to the ePro Request:
 - Valid quote; or an invoice for subscriptions, registrations, or licenses;
 - Service Agreement Form (MSA) & DOS form;
 - eVerify Affidavit any other appropriate documents;
 - Fully executed contract or agreement
- If your request is ***URGENT*** – mark the email as important and send to procurement@valdosta.edu
 - Provide the requisition number and the reason for urgency
 - Date the goods need to be on campus or services need to begin



Requester Responsibilities **AFTER** Submitting an ePro Request

- Track the status of requisitions in ePro through Manage Requisitions
- Inspect and accept or reject purchased items when delivered to your Department by VSU Central Receiving
- Submit invoices and request for payment forms to Accounts Payable via accountspayable@valdosta.edu
- Document and alert Procurement to any problems with Supplier(s) or with purchased items/services **RIGHT AWAY.**



VSU Copier Program

- **Desktop Printers and Multifunction Copiers:**
 - Purchases, leases, and maintenance agreements are coordinated through Procurement.
 - For all inquiries, issues, or requests contact Procurement@valdosta.edu
- **Annual Copier Renewals:** each fiscal year you will submit an ePro Requisition for your departmental machine(s) to be renewed.
 - Our office will reach out to requesters at the beginning of each new fiscal year with instructions on how to enter requisitions and updated pricing.
- **Our Xerox-Specific Service provider** is an **American Business Center**.
 - Have your machine's serial number(s) on hand **BEFORE** calling :
 - To order supplies call **800-599-2198**
 - For servicing of machine call **800-821-2797**



Purchasing Tips & Limitations

- Requisitions (Reqs) are processed by a Buyer in the order they are approved & pass Req budget check
 - Enter your Req when all required documents are obtained or a fully executed contract is provided back to the Department by the VSU Contracting Officer.
- Requisitions do **NOT** secure funds out of your budget; Req budget check only determines if funds are available at the time of Req submission & Approval
 - Funds are not actually secured out of your budget until you receive a signed PO back from Procurement
- Procurement authorizes and places Special Item orders/services with the Supplier; **not** the Department
 - Submitting a Special Item Requests does not to give authorization to Supplier to begin order/service fulfillment
- Only those employees with Delegated Signing Authority have the right to incur debt on behalf of VSU
- Delegated Signing Authority is different than a Budget Manager's signing authority
 - Budget Managers are authorized to sign VSU related documents confirming that funds are available for the request.
 - Requestors are authorized to sign VSU related documents confirming that they are the End User making the request.
- If you do not have Delegated Signing Authority, but authorize a Supplier to proceed with fulfillment of an order or begin providing services without the funds being secured on a PO - you are in direct conflict with State and USG policy and may be held liable to cover the cost of the purchase out of personal funds.

The list of Delegated Signatories can be found here:

<https://www.valdosta.edu/administration/legal/documents/delegationofcontractsigningauthority.pdf>



Purchasing Tips & Limitations Cont.

- USG and SACs requires all payments are made via ACH/EFT Direct Deposit.
 - ACH is more secure, but takes longer to deposit into the Supplier's bank account
 - EFT is less secure, but will deposit into the Supplier's bank account sooner than an ACH payment
- Request for Payment forms submitted to Accounts Payable without a PO must be <\$2,499.
 - Requests for Payment that do not have an established PO will require the Requesting End User's, Budget Manager's, & the Department's VP's signature, acknowledging that proper Procurement Policy was not followed by the Department
- Request for Payment forms submitted to Accounts Payable will be sent back to the department if the purchase was \$2,500+ and no PO was established before purchase was made.
 - Departments that receive a returned Request for Payment form for a purchase that was \$2,500+ must submit the invoice for the purchase & the Request for Payment form, into ePro as a Special Item Request
 - A Request for Payment with your VP's signature must be attached to the Special Item Request
 - Accounts Payable will not remit payment for purchases that were \$2,500+ without an established after-the-fact PO & signed Request for Payment Form
- Requisitions submitted with a quote or agreement that include Supplier terms OR there are Supplier terms are included on the quote or agreement by reference via a web link will require contract review.
 - This review is required of all Supplier provided terms & conditions regardless of dollar value
 - This requirement is because a breach of Supplier terms may result in legal action & fees to resolve the breach



DISCOVER YOUR OPPORTUNITIES

If You Need Assistance With:

Contract Review Requests, Questions, or Issues

contracts@valdosta.edu

General Procurement; Supplier Onboarding

procurement@valdosta.edu; supplier@valdosta.edu

pCard or Fleet Management

pcard@valdosta.edu; fuelcard@valdosta.edu

IT Purchasing or IT Quotes

itpurchasing@valdosta.edu; itquotes@valdosta.edu



DISCOVER YOUR OPPORTUNITIES

If You Need Assistance With Cont.:

Determination of Status for Independent Contractors
vsuindependentcontractor@valdosta.edu

Travel; Accounts Payable
travel@valdosta.edu; accountspayable@valdosta.edu

Budget
budgets@valdosta.edu

Training Requests
training@valdosta.edu