

Procurement Guidelines & Procedures



**VALDOSTA
STATE
UNIVERSITY**

Information contained in this training is provided by:
The Valdosta State University Office of Procurement
Revised 01/01/2020



How to Find Us

Contact Information

- Phone: 229-333-5708
- Fax: 229-333-7408

Our Office Location

- University Center, Entrance 7
- Office Suite 1200

School Addresses

- Mailing: 1500 N. Patterson St, Valdosta GA 31698
- Shipping: 2903 N. Ashley St., Valdosta GA 31602

VSU Procurement Website:

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

Find Your Department's Buyer!

<https://www.valdosta.edu/administration/finance-admin/financial-services/procurement/find-a-buyer.php>

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/>



Our Team

- Antolina Pilgrim – Director, Acct'g & Procurement
- Catherine Storey –University Purchasing Manager & CUPO
- Courtney Stone – PCard Procurement Specialist
- Kevin Boyd - Risk & Fleet Procurement Specialist
- Heather Craft – University Buyer III
- Teresa Davis – University Buyer II
- Vacant – University Buyer I
- Procurement Graduate Assistant - Makayla Clark
- Procurement Graduate Assistant - Dean Frankenberg



Procurement Team's Areas of Focus

- **Catherine F. Storey** – University Purchasing Manager & CUPO
 - Contracting, Bids, PCard, Fuel Card, Fleet, Suppliers, Copiers, General Procurement
- **Courtney E. Stone** – PCard Procurement Specialist
 - PCard, Supplier Onboarding
- **W. Kevin Boyd** - Risk & Fleet Procurement Specialist
 - Risk Insurance, Fleet Administration, Fuel Card, Student Health Insurance
- **Heather H. Craft** – University Buyer III
 - IT Procurement, General Procurement, Contracting
- **Teresa A. Davis** – University Buyer II
 - General Procurement, VSU Copier Program
- **Vacant** – University Buyer I
- **Makayla Clark** - Procurement Graduate Assistant
- **Dean Frankenberg** - Procurement Graduate Assistant



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*
- **ARI** *State contracted vehicle maintenance program*
- **Fuel Card Program** *via WEX portal & State Office of Fleet Management*
- **Risk Insurance** *& Student Health 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

- **GaFirst Marketplace:** Online catalog of Mandatory and Convenience Statewide Contracted items.
 - Catalog is housed in PeopleSoft Financials portal
 - Completely automated work flow
 - Does not require Buyer review since all items are on Statewide Contract
 - 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 Con't

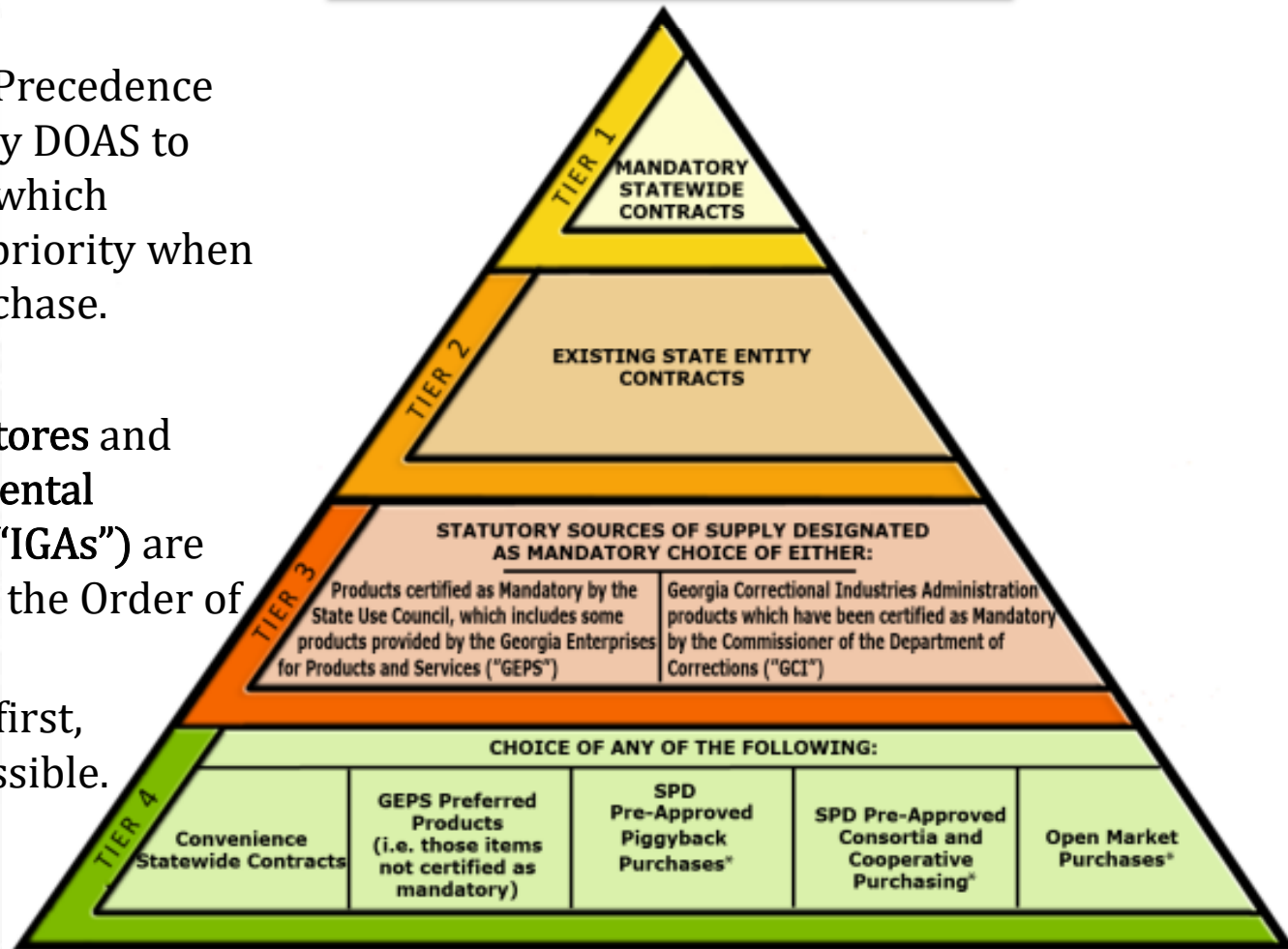
- **Special Item Request:** Items that are not available in GaFirst Marketplace; aka Open Market
 - Open Market Purchases are goods/services not available from another VSU Department, items not on Statewide Contract, all purchase requests for service related purchases, and all Furniture related purchase 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

- 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 or IGA





VSU Central Stores

- Stocks standard white 8.5" x 11" copy paper
- Standard copy paper **MUST** be purchased from Central Stores.
- 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.
 - Do not require competitive bidding.
 - Do not require Contract Review or
 - Available for Piggy Back purchases
 - Provides greater purchasing power resulting in savings from bulk purchases among more than one agency/institution



Security & Immigration Contractor Affidavit

- State and Federal law require 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 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



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 price listed in GaFirst Marketplace**
- **Required additional actions & documents (as applicable):**
 - Payment Works Invitation if:
 - Supplier that is not active or up-to-date in PeopleSoft
 - Active Supplier that has not set up Direct Deposit information
 - Completed Service Agreement & HR-Approved Determination of Status Form:
 - For services provided by an individual; who agree to VSU terms & conditions
 - 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



Special Item Request Cont.

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

- **Security & Immigration Contractor Affidavit:**
 - Services provided by a Company 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



VSU Amazon Business Prime

- VSU Amazon Business Prime account provides Prime discounts and delivery times.
- To purchase through the Amazon Business Prime account:
 - Confirm items are not on a Statewide Mandatory Contract.
 - Send a compiled a list of the items being requested to amazonvsu@valdosta.edu
 - Requests MUST include the following:
 - the Amazon link to the item(s), and item/part number(s) if available,
 - requested quantity and any specific options such as color, packaging sizes, etc. if applicable
 - budget chart string to be used
 - Name of Requestor that the requisition should be assigned to for tracking purposes
 - Name of Department Point of Contact that can answer questions regarding the order (if different than Requestor)
- Procurement will submit a requisition on behalf of the Requestor
- A reply email will be sent with the Requisition number for Req tracking purposes

Important Note: Price changes between the time of requisition creation and final order submission may result in parts or all of the order not being accepted by Amazon. Budget Managers **MUST** approve Amazon requisitions within 72 hours.



VSU Copier Program

- **Multifunction Printers/Copiers:**
 - Purchases, leases, and maintenance agreements are coordinated through Procurement.
 - For all inquiries, issues, or requests contact vsucopiers@valdosta.edu
- **Annual Copier Renewals:** each fiscal year you will submit an ePro Requisition for your departmental machine(s) to be renewed.
 - Requisitions for renewals must follow these guidelines:
 - Enter a single line per machine on the requisition (whether a lease or maintenance plan) - encumber enough funds for all 12 months of charges
 - Enter a single line that combines black/white and color prints. Enter a quantity of 1, and a dollar value that will encumber adequate funding for the entire fiscal year for both types of prints (as applicable)
- **Our Xerox-Specific Service provider** is **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**



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 and Legal Affairs- as well as 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 submitted for Budget Approval.

Be sure to attach all Contract documents to the Requisition



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.



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;
 - Requisitions can be submitted for approvals regardless of the Supplier's registration progress in Payment Works.
 - Make sure quote is valid and not expired



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 & 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, 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.



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
 - Submitted a Special Item Requests are 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 because a breach of Supplier terms may result in legal action & fees to resolve the breach.



DISCOVER YOUR OPPORTUNITIES

If You Need Assistance With:

eProcurement Approval, Workflow, or Login Issues

pshelp@valdosta.edu

Contract Review Requests, Questions, Issues or Solicitations & Bids

contracts@valdosta.edu; bids@Valdosta.edu

General Procurement; Buyers/POs, or Supplier Onboarding

procurement@valdosta.edu; buyers@Valdosta.edu; supplier@valdosta.edu

pCard, Fuel Card or Fleet Management

pcard@valdosta.edu; fuelcard@valdosta.edu; fleet@Valdosta.edu

IT Purchasing or IT Quotes

itpurchasing@valdosta.edu; itquotes@valdosta.edu

Amazon Business Prime Requests:

amazonvsu@valdosta.edu;



DISCOVER YOUR OPPORTUNITIES

If You Need Assistance With Cont.:

Multifunction Copier Requests, Issues or Questions:

vsucopiers@valdosta.edu

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