

FSO PROCUREMENT & CONTRACTING SERVICES



Purchasing 101



Get Purchasing Involved First!

- Contact the Buying Team
 - Tom Fiebiger – Purchasing Manager
 - Lila Sorensen – Buyer, Senior
 - Gloria Zimmerschied – Retired!
 - Denise Puella-Ruiz - Buyer
 - Celeste Kanzig – Buyer, Senior
 - Jeff Sembar – Buyer
 - Marcia Steiner – Buyer, Associate
 - Carlos Lopez – Office Specialist Senior
- Main Line: 621-1747



Processing Orders Under \$5,000 "Small Dollar"

Ways to Process an Order:

- Requisition
- PCARD
- Arizona Buyways

Requirements for a Requisition:

- PCARD Justification
 - If you can use a PCARD that is the first option.
- Small Vendor Justification



Processing Orders Over \$5,000 and under \$100,000

Ways to Process:

- 3 Bids
- Sole Source
- Contracted Vendor (Cooperatives/State Contracts)
- Arizona Buyways - Must be Contracted Vendor



Back Up Documentation Requirements between \$5,000 and \$100,000

- 3 Bids
- Sole Source
- Contracted Vendor
- Other Situational Requirements:
 - Icon
 - Insurance
 - Contract
 - Travel
 - Outside Professional Services/Consultants



3 Bids

- Must be “apples to apples”
- Attach Current Quotes
- Should go with the lowest vendor
- Can attach screen shots from websites showing pricing as a quote.

Vendor Name: AZ Glitter Glitter - R - Us Glitter Depot

Line #	Quantity	Price	Price	Price
Red Glitter	1 Ton	\$5,650.00	\$5,827.00	No Bid
Blue Glitter	1 Ton	\$5,650.00	\$5,827.00	
	Total	\$11,300.00	\$11,654.00	

Memorandum of Record

Glitter Depot did not have the requested colors of glitter available see attached email from vendor.



Quiz!

- True or False:

This 3 bid analysis would be acceptable:

Vendor Name:		Honda	Mercedes	Lexus
Line #	Quantity	Price	Price	Price
Sedan	1	\$24,000.00	\$52,000.00	\$48,000.00



Sole Source

- Attach a Sole Source Justification Form signed and written by the PI
- Attach a Quote
- Vendor must be the ONLY vendor who can provide a product or service
- Sole Source cannot be written by the vendor
- Typically takes a little longer because of audit requirements



Sole Source - Justifications

- Match existing
- Proprietary software, ingredients, parts for repair
- Maintain Warranty with original vendor
- Continuity of Research
- Only item that can integrate into current system
- Continuing Agreement or License
- Questions on Individual Situations? Call a buyer!



What does not constitute a sole source?

- Equipment
 - Available from other distributors
 - If other equipment can possibly perform the same function
 - This is the piece equipment used before at another University (unless it will skew the results on a research project)
 - Good Customer Service
 - Reliability
- Services
 - We have used this vendor/independent contractor before
 - Location preference (hotels, conferences, etc.)
 - Grounds were nicer



Quiz!

Which sole source would be acceptable in an audit?

- A – We have used vendor X for the past 10 years, they provide good customer service.
- B- Vendor X is the only vendor that provides the specific reagent used by our lab equipment. Although other vendors sell reagents a change at this point in our experiment would skew the results.
- C – Vendor X was chosen because they can provide all of the specifications required. They are a local vendor and can be on call. They also lowballed their quote to get into the market.



Contracted Vendors

For purchases from \$.01 and beyond!

- State of Arizona
- Purchasing Cooperatives (National IPA, E&I, Novation)
- ASU/NAU (Tri-U)
- Mojave
- City of Tucson
- Pima
- Other Political Subdivisions



Contracted Vendors

- Where to go to find all this information?
- pacs.arizona.edu

The screenshot shows the website for FSO Procurement & Contracting Services at the University of Arizona. The header includes the university logo and the title 'FSO PROCUREMENT & CONTRACTING SERVICES'. A navigation menu contains links for Home, About Us, Training, Forms, Vendor Resources, FAQs, and Staff Directory. The main content area features a 'SPOTLIGHT' section with three items: a 'Next Surplus Property Auction' starting on February 3, 2015; an announcement for a 'New, Consolidated Business Travel Management Program with EnSol Travel'; and a notice about notifying Printing Services. To the right is a sidebar with various service categories and their respective links, including Arizona BuyWays, Central/AHSC Receiving, Contracting Office, Postal Services, Printing Services, Purchasing Card, and Purchasing Office. A red arrow originates from the top navigation bar and points to the 'Purchasing Office' link in the sidebar.

Arizona BuyWays
Staff, Login (Shop Catalogs), Training, Forms, FAQs

Central/AHSC Receiving
Staff, Services, Freight Shipments, Inspections, FAQs

Contracting Office
Staff, Procedures, Catering Policy, Contracting with Hotels, Approved Caterers, FAQs

Postal Services
Staff, Bulk Mail, Mail Preparation, Postage Rates, Mailing Links, Mailing Tips, FAQs

Printing Services
Staff, Print Supplier Program, Stationery Guide (pdf), Ordering Tips, Mailing Brochure (pdf), Request for Estimate Form (pdf), Staff Memos, FAQs

Purchasing Card
Staff, Program Information, Policies, Training, Exam, Forms, FAQs

Purchasing Office
Staff, Policies, Contracted Vendors, Conflict of Interest, Sole Source Guide (pdf), FAQs

AZ Buyways

- Vendors in the red section are vendors that are ok to process above \$5,000 on Buyways.
- All orders exceeding \$5,000 are reviewed by a buyer.
- Order below \$5,000 are submitted automatically through the system and not seen by the buying team.
- If a order is sent through over \$5,000 with a non-contracted vendor the buyer will have to cancel the order and regular requisition must be done through regular purchasing routes.
- Do not mix taxable and non-taxable items, your order will not process and be voided.



FY 2014-15 Validation Stickers are now available through Stores. The item number is 01002800.

UACCESS FINANCIALS TIP OF THE MONTH:

Purchases over \$5000 are allowed on Arizona BuyWays (Shop Catalogs) with the following vendors: Bio5, CDW-G, Dell, Fisher, GovConnection, Grainger, Graybar, HP, Insight, Life Technologies, Office Depot, OfficeMax, Staples, Stores, TIG, UA BookStores, VWR, and West Press.

PLEASE NOTE: Shipping costs may be added for BioExpress, Bio-Rad, Clontech, Crescent, Denville Scientific, eBioscience, EMD Millipore, Genesee, Graybar, IDT, Life Technologies (Invitrogen), Newegg, PerkinElmer, Qiagen, RPI Corp., Santa Cruz Biotechnology, Sehi, Sigma-Aldrich, and Swagelok orders. A \$5 handling fee will be added to Sarstedt orders under \$50.

24/7 IT Support Center: 626-8324

Arizona BuyWays Helpline: 626-8979

Coming Soon to Arizona BuyWays:

Roche Diagnostics

Target Commercial Interiors

Quick Links

Arizona BuyWays Return Form

Arizona BuyWays Training

Arizona BuyWays Web Page

Extremely Hazardous Chemicals

Other Situational Requirements

- Independent Contractor Form (ICON) – fully signed.
- Insurance – Required if work poses a risk to the University.
- Contract – Buyer will sign if associated with a requisition.
- Travel – Notes needed to approve Purchase Order.
- Outside Professional Services or Consultant Agreements.
- Relocation (Moves)



Contracts, who can sign them?

- Anyone with delegated contract authority from President Hart.
 - You will have a signed letter from President Hart indicating your signature authority limit.
- Do not sign anything with terms and conditions or other legal terms.
- When in doubt check with Purchasing!
 - If you sign a contract or quote with terms and conditions you could be personally liable unless you are signing with signature authority on behalf of the Arizona Board of Regents.

** If you are using a PCARD or using a DV contracting will sign your contract or agreement**



Special Procurement

- Hazardous Materials
 - Cannot use PCARD
- Radioactive Materials
 - Object Code 5240
 - Receiving Address
- Drug Purchases
 - Medical License
 - 222 Form
 - Delivery/Medical License Addresses must match



Requisition Guidelines

- Payment Approval
 - Checked: Payment request will route through approvals.
- Service or Quantity
- Taxable or Non-Taxable
 - Tax Exemption Statement
- Special/Delivery Instructions
- Vendor Contact Information
- Prepayment/Deposit Instructions and Approvals.
- Capital



Tax Exemption Statement

RESEARCH AND DEVELOPMENT (EQUIPMENT PURCHASES)

This purchase will be used for research and development purposes as that term is defined by ARS 42-5159(B)(14) and ARS 42-5061(B)(14). The exemption from sales tax pursuant to ARS 42-5061(B)(14) and from assessment of use tax under ARS 42-5159(B)(14) is authorized by [name of department individual authorizing exemption].

CHEMICALS:

THIS PURCHASE WILL BE USED FOR RESEARCH AND DEVELOPMENT PURPOSES AS THAT TERM IS DEFINED BY ARS 42-5159(A)(35) AND ARS 42-5061(A)(39). THE EXEMPTION FROM SALES TAX PURSUANT TO ARS 42-5061(A)(39) AND FROM ASSESSMENT OF USE TAX UNDER ARS 42-5159(A) (35) IS AUTHORIZED BY (add researchers name here)



Attachment Do's and Don'ts

- Do!
 - Attach ANY backup
 - Quotes (make sure they are not expired), justifications, emails that shed light on the purchase, grant awards.
- Don't!
 - Attach ICONS
 - Anything with a credit card number or social security number.



Contacts

- Capital – Mike Mitchell 621-8610
- CRS – Jennifer Brown 626-6676
- Buyways – Hotline 626-8979
- Contracting – Sarah Curley 626-3919
- Accounts Payable – Customer Service 621-9097
- Tax Compliance – Shawn Clodfelter 621-1957
- Faxes
 - Purchasing: 621-5179
 - Accounts Payable: 626-1243
- Website: pacs.arizona.edu



Final Quiz

- True/False: Professor X can sign the quote given to him by a vendor because it has his name listed on it.
- True/False: You can compare HP, Dell, and Lenovo computers in a 3 bid situation.
- True/False: You have one bid for \$98,000 and two other bids over \$100,000 you can process this as a 3 bid situation.
- True/False: You can sole source a vendor because you like their customer service.
- True/False: You should always attach the ICON form to the Edoc.
- True/False: You need two additional bids if a contracted vendor does not quote the items you are purchasing on contract or through a cooperative agreement.



Questions?

