Purchasing Forum
4/5/19

uwgpurchasing@westga.edu

The content of this presentation was the most up-to-date information available at the revision date. However, policies, procedures and guidelines may be updated during an academic year. Please refer to the University Policy website for the most current version of these policies, procedures and guidelines.

Revised 4/2019
Central Stores & Receiving Update

- Campus Convenience!
- GEPS-who??
- Items available: glass cleaner, bleach, tile cleaner, gloves, safety glasses, plumbing supplies, towels, tissues, disinfectant, paint, paint brushes, box cutter, trash bags, clorox wipes, batteries, copy paper 30% or more recycle
- Personal packages do not deliver to UWG, CSR&D sign for them owner will have to pick package up.
- uwgcentralstores@westga.edu
Central Stores Web Order Process
1. Go to westga.edu and click on the A-Z index
2. Click on the letter C then click on Central Stores, Receiving & Delivery
3. Toggle over Central Stores then click Central Stores Order Application
4. Type one keyword for the item you are looking for in the search box. For example, if you are looking for copy paper then type “paper.” If you are looking for batteries then type “batt.” You may also click search to view all items in inventory.
5. Complete the customer information. Check the order box on the line of the item you need and type in the quantity of how many you need in the Qty box. Click submit to place the order.
Year End is Coming...

5/24/19 **Last day** for routine P-card charges to be charged for FY19

5/31/19 May P-card reconciliations due to Purchasing (early deadline)

6/4/19 Last day for Marketplace & special requisitions in ePro-all must be electronically approved and passing budget check by 5:00pm

6/7/19 Last day for fuel pumped at Central Stores to be **charged to FY19**
MEANWHILE

IN THE PURCHASING DEPARTMENT...
New!!! **Wednesday 6/26/19**

**Last day to receive** items in ePro for FY19. All items delivered after this date should be received electronically once Peoplesoft opens in July. Check Purchasing website for any updates!
Recent Updates

- Purchasing items with personal funds
  - Not best practice
  - Potentially not reimbursed
  - State does not reimburse taxes
- Shipping address - ALWAYS USE UWG University of West Georgia
  1601 Maple Street
  Carrollton, GA 30118
- Personal Packages - Do not ship to UWG.
- Any items paid for with institutional funds should be shipped to UWG and not a personal address.
Purchasing 101 Defined

Two types of statewide contracts:

1) Mandatory - mandated by law
2) Convenience - provided as a convenience

What if a mandatory contract is available but does not meet your requirements? A request for waiver on your behalf to purchase the item from another source with a reasonable justification: (Examples - significant cost savings - minimum 10%, compatibility issues, specials needs not covered by existing contract, delivery time factors)
Tips and Reminders

**Contracts**

- Who has signature authority??
- Any contract, agreement, credit application, vendor profiles for outside suppliers should be sent to Purchasing for signature.
- Standard one page service agreement available on Purchasing’s website
- Send anything with terms & conditions for review (both paper or electronic)
Recent Updates

- Lowe’s is on contract - 5% cards - PO’s/P-Card, invoices/delivery tickets to Accounts Payable

- Adjustable sit stand desks comparable options are available on contract thru Workrite & GCI (Georgia Correctional Industries)
Commonly used state contracts

- Furniture
- Staples
- B&H
- McKesson
- Apple
- Software
- SCW
- Airgas

uwgpurchasing@westga.edu
The I.T. Dept is

"WORKING ON IT"
IT Purchases

- All new systems/applications must be submitted through the Office of IT Strategic Planning for review & ranking.
- Submit IT solutions/software/applications with year-end funding by Friday, May 3. This allows sufficient time to review project feasibility and present to the IT Steering Board.
- Projects are ranked by the IT Steering Board. Projects are worked in the order they are received unless otherwise justified and re-ranked by the Steering Board.
- Applications that allow the acceptance of Credit Cards must go through the PCI Committee.
- Project proposals require approval from the requesting unit at at least the AVP level before review can begin.
- Tech purchases over $250,000 must go through USG.
- We cannot guarantee that projects submitted for year-end funding will be implemented by the start of the Fall Semester.
IT Purchases

• Project Proposal Link: https://ipmo.westga.edu/General/NewProject.aspx

• Questions on IT Projects?
  Email ipmo-list@westga.edu
Software Update

• Cannot be reimbursed for software/apps put on personal computers or cell phones
• Prohibited p-card purchase eff 5/1/19
• Needs to be done via PO
• contact ITS (approval) & Purchasing (state contract pricing availability)
Software Contract Suppliers

Category Description

Category 1: End User Software. Generally, these are desktop software products
Category 2: Enterprise Software. These are server-based system.
Category 3: Microsoft Reseller Services.
Category 4: Oracle Software and Databases (including Peoplesoft)

SHI  SoutheastTeam@shi.com
Dell  Brad_stroup@dell.com
PC Specialists  Robert.Kopesky@tig.com
CDW-G  Mikezor@cdwg.com
Presidio  ballen@presidio.com
IBM  erice2@us.ibm.com
P-Card

- Promo items bought for giveaways should be done via PO or check request...no P-card
- Amazon charges
- Reminder-only full time employees eligible
- Plan Amendments Effective 5/1/19
- Software must be purchase via PO
- Undocumented sales tax charges
- No altering of google log transaction after approval are in place (new major violation)
Reminder about Violation Policy

• 3 minor violations = card suspension 1 month
• additional violations ... case-by-case basis, but puts account on probation status
• refresher training required by card holder & encouraged by approvers to continue card use
Tips and Reminders

More is better!
- **Always** attach a quote, contact name, email, phone number in comment section
- Special delivery instructions
- Special handling instructions
- Description of items - Audits
- Invoice/Receiving - send to apinv@westga.edu
- Always enter a supplier
- **Approvers**- denying a single line of a requisition causes all lines to be denied
### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Item # 2576 Ultra Cotton T-Shirt</td>
<td>150,000</td>
<td>Ozier Products, Inc</td>
<td></td>
<td>Each</td>
<td>5.500</td>
<td>825.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Shipping Summary

- **Ship To Location**: PURCHASING
- **Address**: University of West Georgia
  - Cent Rcv for Purchasing Dept.
  - 1601 Maple Street
  - Carrollton, GA 30118
- **Attention To**: Udin Alexandra C

#### Requisition Comments and Attachments

- **Enter requisition comments**
  - Alex Stewart
  - alestewart@westga.edu
  - 678-539-6395
  - Quote for Student Promo giveaways

- **Send to Supplier**: ✅
- **Show at Receipt**: ✅
- **Shown at Voucher**: ✅

- **Add more Comments and Attachments**

#### Approval Justification

- **Enter approval justification for this requisition**
  

#### Check Budget

- **Save & submit**
- **Save for Later**
- **Add More Items**
- **Preview Approvals**
Manage Requisitions

- Epro>Manage requisitions> Date From> special request or Marketplace.
- Dispatched purchase order- not received?
- Received and Not paid?
- Please send all invoices to Accounts Payable for processing.
- Email invoices to apinv@westga.edu
- Setting up a new vendor:
- Send completed vendor profile, ACH & W-9 forms to vendor@westga.edu
### Manage Requisitions

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000529972</td>
<td>Desk for Georgia Evans</td>
<td>54000</td>
<td>04/03/2019</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>643.62 USD</td>
</tr>
<tr>
<td>0000529971</td>
<td>Annex Work Room Unit</td>
<td>54000</td>
<td>04/03/2019</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>560.50 USD</td>
</tr>
<tr>
<td>0000529948</td>
<td>Ed. 204/205 Tech Fee FY...</td>
<td>54000</td>
<td>04/03/2019</td>
<td>PO(s) Created</td>
<td>Valid</td>
<td>19,375.50 USD</td>
</tr>
<tr>
<td>0000529923</td>
<td>Printer for H. Chambers</td>
<td>54000</td>
<td>04/02/2019</td>
<td>PO(s) Created</td>
<td>Valid</td>
<td>160.54 USD</td>
</tr>
<tr>
<td>0000529868</td>
<td>Coliseum 2106 Tech Fee ...</td>
<td>54000</td>
<td>04/01/2019</td>
<td>PO(s) Created</td>
<td>Valid</td>
<td>15,471.84 USD</td>
</tr>
<tr>
<td>0000529841</td>
<td>CyberCamp Supplies_3.29.19</td>
<td>54000</td>
<td>03/29/2019</td>
<td>PO(s) Dispatched</td>
<td>Valid</td>
<td>230.00 USD</td>
</tr>
<tr>
<td>0000529813</td>
<td>OFE Office Supplies_3.2...</td>
<td>54000</td>
<td>03/28/2019</td>
<td>Received</td>
<td>Valid</td>
<td>148.00 USD</td>
</tr>
</tbody>
</table>
NO SOUP FOR YOU!!!
Food Purchases

- Should **NEVER** be made via GA First Marketplace!!
- All food purchases must have a pre-approved food form from Accounts Payable.
- Send quote, food form, list of attendees and event flyer to A/P in Controller’s Office for approval before entering a requisition.
Tips and Reminders

Copier Leases

• Options available:
  • Canon, Ricoh, Xerox, Toshiba

Canon  allison@coec.com
Ricoh  stan.fuhr@ricoh-usa.com
Xerox  terone.harrisjr@xerox.com
Toshiba  casey.eidson@tbs.toshiba.com

• Desktop Printer contract-convenience
Tips and Reminders

**Cellular/Data Devices**

- Options Available: Verizon, T-Mobile, AT&T
- NIGP Codes
  - Cellular Voice Devices - 83935
  - Cellular Monthly Charges - 91575
  - Data Devices - 83840
  - Data Monthly Charges - 91551
- Account Codes
  - Cellular - 771300
  - Data - 771800

*Notify Asset Mgmt to surplus old equipment please*
Tips and Reminders

Promotional Items

- State contract coming
- Options (attend the Oct vendor fair)
- NIGP Codes
  - Promotional Items - 03778
  - Set Up Charges - 96642
- Vendor have permission to use UWG logo?

Sherri Shelnut - Coordinator Marketing and Communication
email: sshelnut@westga.edu
Kahoot

• Smart phone, Tablet, or Laptop
• Open web browser:
• kahoot.it
• Game Pin: ____________________
Puppies and Rainbows
Taxable Fringe Update

What has changed:

• Effective January 1, 2019

• Wearable items can only be purchased through ePro or a direct charge form at the UWG bookstore.

• Taxable Fringe forms can be found on the purchasing website: under Forms, General.
Taxable Fringe Update

• To expedite processing of Purchase Orders please attach:
  • Copy of the quote
  • Signed Taxable Fringe Form (PDF)
  • Excel version of the Taxable Fringe Form

• Accounting will review and track purchases to determine taxability and will provide periodic updates to ensure no purchases were missed.
Taxable Fringe Update

Tracking clothing purchases

Dept: Need for clothing → Dept: Manually complete order form → Dept: EE signs form to acknowledge tx ramifications → Dept: Enter & attach clothing form to Requisition → Psoft: Auto create PO

PURCH: Review & Dispatch PO → Vendor: Fulfills order → Vendor: Ships clothing → Dept: Receives clothing → Dept: Distributes clothing

Payroll: Order Info to Accounting for tracking → Payroll: Record transaction in clothing log → Payroll: Monitors purchases for threshold breach (W2)

Payroll: Record income into W-2 → Payroll: Sends email to EE

STOP
# TAXABLE FRINGE REPORTING FORM

This form is used by the University departments to report wearable items, including clothing, uniforms, and accessories provided to employees. UWG Purchasing Services will review and forward information to Payroll for tax withholding and W-2 reporting, as required by federal law.

### Method of Payment
- [ ] Requisition / PO:
- [ ] Check
- [ ] Internal Billing Form
- [ ] Check

Please attach the completed form to your ePro requisition or internal charge request form at the UWG Bookstore.

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Amount</th>
<th>Brief Description of the Wearable Item(s)</th>
<th>Job Title</th>
<th>Employee Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>99999999</td>
<td>Doe</td>
<td>John</td>
<td>$75.00</td>
<td>(3) Embroidered Sport Tech Polos</td>
<td>Controller</td>
<td>John Doe</td>
</tr>
</tbody>
</table>

Employee signature(s) acknowledges wearable items are being ordered on their behalf, and may have a taxable impact.

A copy of the Excel Spreadsheet, & a signed copy of this sheet must be attached to the ePro requisition for the PO to be processed.

Additional Information/Explanation:
Important Links

• Purchasing Website
• CSR&D
• NIGP Codes
• P-Card Plan
• Account Codes
THANK YOU FOR ATTENDING!!

See you at the Vendor Fair Friday
October 4th, 2019 @ The Coliseum