

Oklahoma State University
Purchasing e-News

This is the first in a series of monthly Purchasing e-newsletters. It will be distributed to those on the administrative list serve and others by request. It will also be posted on the Purchasing website (www.purchasing.okstate.edu).

Contracts

1. OSU Contract: A new OSU contract for OSU student group travel has just been awarded. Contact David Rauch (405-744-5984) for a list of participating vendors.
2. State Contracts: The following State Contracts satisfy the OSU bidding requirements for purchases over \$2,500. Departmental personnel may make purchases from these vendors for \$2,500 or less using the p/card. Purchase requirements over \$2,500 must be processed on a requisition through the Purchasing Department. Call the Purchasing Department about a “blanket requisition” for volume purchases against these contracts.

- Fisher Scientific Complete catalog (Contact Purchasing for User Name and Password)
- WW Grainger Complete catalog
- VWR Complete catalog

You may access these catalogs through the Purchasing website:
www.purchasing.okstate.edu.

Important Dates

1. Requisitions requiring Board of Regents approval (\$35,000 or greater) are:
 - Due in Purchasing: February 11, 2004 (Board meeting March 4, 2004)
2. P/card Training
 - January 20, 2004, 9:00 am – 416 Student Union (registration required)
 - February 3, 2004, 2:00 pm – 416 Student Union (registration required)

To register for p/card training sessions contact Human Resources at 744-5374.

Purchasing e-news provided by: Oklahoma State University
Purchasing Department
208G Whitehurst Hall
Stillwater, OK 74078
Phone: 405-744-5984, FAX: 405-744-5187
Email: purchase@okstate.edu

How to Expedite a Requisition

- Obtain appropriate signatures before delivery to the Purchasing Department
- Complete all required information
- Attach supporting documentation (specifications, suggested vendors, sole source affidavits, quotes, etc.)

Contracts

The following E&I contracts meet bidding requirements and may be used by departments accordingly.

- HP printer contract –Hewlett Packard (new-to be awarded March, 2004)
- Office Supplies – Boise Cascade
- Lab supplies – VWR
- Centrifuges – Fisher Scientific and Beckman Coulter

Use the p/card for purchases \$2,500.00 or less and a requisition for purchases of \$2,500.00 or more.

You may access these contracts through the purchasing website at:

www.purchasing.okstate.edu.

Reminder

Payments to international visitors have many immigration restrictions and tax considerations. Please contact Linda Dunbar, International Tax Coordinator at 744-5459, BEFORE your visitor arrives.

Recall Notice

Check notices on Purchasing web site for recent Kawasaki ATV and John Deere tractor recalls with safety issues. All future recall notices will be posted on our website.

Important Dates

1. Requisitions requiring Board of Regents approval (\$35,000 or greater) are:
 - Due in Purchasing: March 31, 2004 (Board meeting April 23, 2004)
2. Purchasing Training
 - Purchasing Policies & Procedures – March 11, 9:00 AM, 106B Whitehurst
 - P/card Training – March 2, 9:00 AM, 416 Student Union
 - To register for these training sessions contact Human Resources at 744-5374.

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Contracts

- Departments may use the Furniture Contract for up to \$35,000 without bidding. This contract, which lists over 100 brands of furniture, has been competitively bid. Contracts may be viewed on the purchasing website under the “contracts” link.
- Oklahoma Correctional Industries produces an extensive line of products and services that are exempt from bidding requirements. Some of the items available are furniture, printing, janitorial supplies, mattresses, and boxes. Their online catalog may be viewed at: www.state.ok.us/~osi/.

NOTE: Use the p/card for purchases of \$2,500 or less and a requisition for purchases of \$2,500 or more.

Reminders

- **P/CARD:** When an employee who has a p/card leaves the University, the department must be sure to cancel their card through the Purchasing Department.
- **FREIGHT:** Quotes or bids obtained by Purchasing usually include freight charges. Additional freight charges should not be paid.
- **OSU LOGOS:** Vendors must be licensed to produce products (i.e. t-shirts, pens, other promotional items) bearing the names, logos, and trademarks of the University. (P&P 1-0203) A list of licensed vendors may be obtained from Licensing at 405-744-6494.

Important Dates

1. Requisitions requiring Board of Regents approval (\$35,000 or greater) are:
 - Due in Purchasing: March 31, 2004 (Board meeting April 23, 2004)
2. Purchasing Training
 - P/card Training – April 6, 2:00 PM, 416 Student Union
 - To register for these training sessions contact Human Resources at 744-5374.
 - Purchasing personnel will also come to your department to conduct training on-site at your request.

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Reminders

- P/CARD: Student Appreciation Week was April 12 -16. Administrative Professionals Day was April 21. Please remember that the p/card cannot be used to buy gifts or tokens of appreciation.
- TONER VENDORS: Be cautious when speaking with toner vendors you are not familiar with. Unscrupulous vendors will get information about the copy machine you have and begin sending toner cartridges you did not order. They charge exorbitant prices for these cartridges. Recently one of our departments was charged over \$300 for a single cartridge. Exercise caution when you are contacted by one of these vendors.
- MAINTENANCE AGREEMENTS: Currently Equipment Lists (EL) for FY05 lease and maintenance agreements are being sent to vendors.
 - Vendors will send completed EL's to departments for processing.
 - Process EL's only if maintenance is desired by the department.
 - If total is less than \$2,500 per year, department head may sign EL and departments may process invoices in arrears on p/card.
 - If total is more than \$2,500 per year, a requisition must be processed through the Purchasing Department. FY05 requisitions may be processed after June 1, 2004.

Important Dates

1. Requisitions requiring Board of Regents approval (\$35,000 or greater) are:
 - Due in Purchasing: May 26, 2004 (Board meeting June 18, 2004)
 - No Board meeting scheduled for May.
 - FY04 Year-End: Requisitions exceeding \$2,500 and requiring formal quotes or bids are due in Purchasing May 26, 2004.
2. Purchasing Training
 - P/card Training – May 4, 9:00 AM, 416 Student Union
 - To register for this training session contact Human Resources at 744-5374.
 - Purchasing personnel will also come to your department to conduct training on-site at your request.

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Reminders

- **SOFTWARE MAINTENANCE:** Any software maintenance or software agreements must be signed by the Director of Purchasing, regardless of the purchase price.
- **PURCHASING FROM TERMINATED EMPLOYEES:** Per State Statute 74, Section 85.42 "any agency . . . is prohibited from entering into a sole source contract or a contract for professional services with or for the services of any person, who has terminated employment with or who has been terminated by that agency for one (1) year after the termination date of the employee from the agency."
- **PURCHASE ORDERS:** Departments may not place orders for materials or services over \$2,500. For purchases over \$2,500 a purchase order must be issued by the OSU Purchasing Department **prior** to purchase.

Note

- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.

Important Dates

1. Requisitions requiring Board of Regents approval (\$35,000 or greater) are:
 - Due in Purchasing: May 26, 2004 (Board meeting June 18, 2004)
 - No Board meeting scheduled for May.
2. FY04 Year-End
 - Requisitions exceeding \$2,500 and requiring formal quotes or bids are due in Purchasing May 26, 2004.
 - All other requisitions must be received by the Purchasing Department by June 18, 2004, for FY04 processing.
 - Receiving Reports with invoices must be received by the Purchasing Department by June 21, 2004, for FY04 processing.
3. Purchasing Training
 - P/card Training – June 8, 2:00 PM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.

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BOARD APPROVAL NOTICE

- On June 18, 2004, the Board approval limit was increased from \$35,000 to \$150,000 for the OSU System. More information regarding purchasing board rule changes will follow pending finalization of policy.

Notes

- REGISTRATION: (Conferences, seminars, etc.) Attached is a "Conference Letter" form to help determine if a conference qualifies for prepaid registration. Contact Billie Watt if you have any questions.

Reminders

- IMPORTING EQUIPMENT/SUPPLIES: Regardless of amount, contact Tom Yant, for assistance with importing and information regarding qualifications and application for duty free entry.
- P/CARD: When an employee leaves the University, remember to have them return their purchasing card and have Purchasing cancel as soon as possible.

Important Dates

1. Requisitions requiring Board of Regents approval (\$150,000 or greater) are:
 - Due in Purchasing: July 7, 2004 (Board meeting July 30, 2004).
 2. P/card Training – July 1, 9:00 AM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
 3. P/card Refresher classes – July 6, 9:00 AM or July 7, 1:30 PM, 408 Student Union.
 - These are opportunities for open discussion of any issues, problems, or concerns you may have. This is not p/card training. Contact Billie Watt at X5984 or watt@okstate.edu to sign up.
- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.
 - Contact Purchasing if you do not currently receive the Purchasing e-News and would like to.

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Notes

BOARD RULE CHANGES

- Exempt from Board approval are expenditures for any amount for the following:
 - Food or items for resale
 - Bulk gasoline, oil and fuel
 - Utilities
 - Non-construction sponsored agreement contracts and expenditures
 - Refunds
- Physical Plant "Small Jobs" construction contracts in excess of \$250,000 shall require prior Board of Regents approval.
- Requisition Signature Authority Matrix – The Associate Vice President & Controller will be sending out information detailing requirements shortly.
- Purchasing Policy and Procedures are in the process of being revised accordingly.

Reminders

- P/CARD SPLIT PURCHASES – Remember that purchases totaling over \$2,500 to one vendor within a 7-10 day period are considered a split purchase and are a violation of p/card guidelines.

Important Dates

1. Requisitions requiring Board of Regents approval (greater than \$150,000) are:
 - Due in Purchasing: August 18, 2004 (Next Board meeting September 10, 2004).
 2. P/card Training – August 3, 2:00 PM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
-
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OSU
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Volume 1, Issue VIII

August 2004

Board Rules

- Board rules (30:10-1-2 section 9) state "Acquisitions and contracts between the amounts of \$5,000 and \$10,000 shall be preceded by the solicitation of quotations by the Institution." There have been some misconceptions concerning this wording. For the OSU system, Institution means that the Purchasing Department will obtain these quotes.

Departments have delegated purchasing authority up to \$2,500. Any amount over \$2,500 must be processed on a requisition prior to purchase.

Notes

- David Rauch, Assistant Director of Purchasing for 16 years, has taken disability. He will be missed by the Purchasing Department and the University. During the interim, the following commodities will be handled as shown below:
 - Contract computer and printer purchases, buses, and fuel – Billie Watt
 - Maintenance agreements, printing, vehicles, and paper – Tom Yant
 - Software licenses, postage/freight, roofing, and other miscellaneous items – Sharon Toy

Reminders

- Payments to international visitors have many immigration restrictions and tax considerations. Please contact Linda Dunbar, International Tax Coordinator at 744-5459 BEFORE your visitor arrives.

Important Dates

1. Requisitions requiring Board of Regents approval (greater than \$150,000):
 - Were due in Purchasing: August 18, 2004 (Next Board meeting September 10, 2004).
 - Requisitions will be due in Purchasing October 6 (Board meeting October 29).
 2. P/card Training – September 1, 2:00 PM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
 3. Purchasing Policies and Procedures Seminar – September 29, 9:00 – 11:00 AM
 - To register for this seminar contact Human Resources at 744-5374.
- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.
 - Contact Purchasing if you do not currently receive the Purchasing e-News and would like to have it sent to you.

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Volume 1, Issue IX

September 2004

Reminders

- **EMPLOYEE INCENTIVE AWARDS:** Non-monetary employee incentive awards shall be accomplished through the requisition process, regardless of the dollar amount. (Per OSU Policy and Procedure 3-0256.3)
- **REMEMBER:** Departments may not place orders for materials or services over \$2,500.
- Purchases over \$2,500 must be processed on a requisition through the Purchasing Department. Purchasing will review the purchase, and if necessary, obtain quotes or bids. A purchase order must be issued by the OSU Purchasing Department **prior** to purchase.

Notes

- When sending e-mail to Purchasing Department staff, please put an explanatory description in the subject line. Due to the large number of e-mails containing viruses, we may not open an e-mail if we do not recognize the name or subject matter.
- The *Purchasing e-News* is for you. Are there any issues or topics you would like to see covered in a future *e-News*? Please e-mail Billie Watt at watt@okstate.edu with subjects you would like to see addressed.

Important Dates

1. Requisitions requiring Board of Regents approval (greater than \$150,000):
 - Are due in Purchasing: October 6, 2004 (Next Board meeting October 29, 2004).
 2. P/card Training – October 6, 2:00 PM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
 3. Purchasing Policies and Procedures Seminar – September 29, 9:00 – 11:00 AM
 - To register for this seminar contact Human Resources at 744-5374.
- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.
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Reminders

- **INSURANCE:** Regardless of the amount, insurance must be processed on a requisition.
- **SPEAKER FEES:** May not be paid on the p/card. This is a professional service and must be processed on a requisition.

Notes

DEPARTMENTAL REQUEST FOR VENDOR CHECK (PAYMENT TO SUPPLIERS):

- A department may pick up a check only in an unusual or emergency situation after obtaining appropriate division head approval.
- The (green) card attached to the receiving report/invoice should include the first and last name and phone number of the individual who will pick up the check.
- If attachments are to be mailed with the check, all additional information should be submitted with the invoice and attachments should be labeled appropriately.
- Prior to releasing a check, the Bursar's office will verify that the individual who picks up the check is the person named on the card, a full-time employee, and possesses a valid OSU employee identification card.

Important Dates

1. Requisitions requiring Board of Regents approval (greater than \$150,000):
 - Are due in Purchasing: November 10, 2004 (Next Board meeting December 3, 2004).
 2. P/card Training – November 2, 9:00 AM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.
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OSU
Purchasing e-News

Volume 1, Issue XI

November 2004

Contracts: PAPER- New State Contract SW50017

- Unisource is no longer the State contract vendor. The new contract for paper may be accessed through the Purchasing website. Click on the link to "Contracts(OSHOP)" and then "Statewide Contracts". The new vendors are:
 - XPEDX
 - Tayloe Paper
 - Clampitt Paper

Reminders: CONTRACTS/AGREEMENTS

Contracts/agreements for purchase of supplies/services must be signed by the Director of Purchasing.

- The Department reviews and accepts the terms and conditions.
- If under \$2,500 – Department submits to Purchasing with a letter from the Department Head.
 - The Director of Purchasing will sign and return after reviewing and editing for compliance with statutes.
- If over \$2,500 – Department submits to Purchasing with a requisition.

NOTE: Departmental personnel are not authorized to sign on behalf of the University

Notes: P/CARD RENEWAL

- If you have an OSU purchasing card, it has an expiration date of 01/05. In December, Bank One will begin to send out renewal cards. These cards will be sent to the address listed on the application form. They will not come to Purchasing. If you have not received your new card by January 15, 2005, please call or e-mail Billie Watt.

Important Dates

1. Requisitions requiring Board of Regents approval (greater than \$150,000):
 - Were due in Purchasing: November 10, 2004 (Next Board meeting December 3, 2004).
 2. P/card Training – December 1, 2:00 PM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.
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Notes:

PAYMENT PROCESSING

- Effective immediately, the processing of Receiving Reports/invoices for payments has been transferred from the Purchasing Department to the Accounting Department.
- Questions concerning payment status should be directed to the Accounting Department, 405-744-5865.
- Requests for funding changes, increases or decreases to purchase orders should be directed to the Purchasing Department.

EXPORTING ITEMS

- Regardless of the amount of the purchase, there are federal export control licensing restrictions governing the shipment of items to other countries. To help ensure compliance with federal regulations, the following guidelines must be followed when purchasing items for export:
 - Purchases of \$2,500 or less are subject to the export regulations. Please review information/procedures posted under the Office of University Research Services (<http://www.osu-ours.okstate.edu/>)
 - Purchases over \$2,500: Indicate on the requisition the final destination (city, country). The final destination of items must be provided to suppliers during the bid process and when purchase orders are issued.
 - Questions concerning export regulations should be directed to Kay Ellis, Office of University Research Services, 405-744-9995.

PURCHASING e-NEWS

- This is the final issue of the Purchasing e-News. Beginning in January of 2005, a newsletter will be published by the Office of the Controller and Associate Vice President. Purchasing, Accounting, Bursar, Payroll, and Financial Information Management will be contributing to this newsletter.

Important Dates

1. Requisitions requiring Board of Regents approval (greater than \$150,000):
 - Are due in Purchasing: January 5, 2005 (Next Board meeting January 28, 2005).
 2. P/card Training – January 18, 2005, 9:00 AM, 416 Student Union.
 - To register for this training session contact Human Resources at 744-5374.
- The policies and guidelines discussed in this newsletter are for the OSU System. Your department, or campus, may have stricter policies which you must abide by.
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