Fort Hays State University

Purchasing

FHSU Purchasing Guidelines and Procedures

http://www.fhsu.edu/purchasing

FHSU Guidelines and Procedures

- When purchasing computers, printers, computer parts, and software, process a Lotus Notes CTC Request Form. This includes all computers parts such as keyboards and mice and all software including boxed, licenses, and maintenance.
- All printing requests are processed through Printing Services. They provide FHSU Logo printed cards: Thank You, Sympathy, and two cards that are blank inside with Picken Hall or the FHSU sign on the front. They can also do stickers, bookmarks, promotional items, etc.
- Use of FHSU's Official Identity Marks (Logo, Tiger, University Seal) on promotional items requires approval from Kent Steward or Mary Ridgway in University Relations prior to manufacturing the item with a FHSU Licensed Vendor. The Identity Marks have been designed to create legally protected visibility for the university's name, services and activities. Licensing Guidelines and Identity Standards can be found at http://www.fhsu.edu/ur/ .
- All current FHSU established contracts are in effect until renegotiated or expired, i.e., Chartwells, Pepsi, and the University (Follett) Bookstore.
- State Use items such as toner cartridges, binders, and other selected Office Supplies must be purchased from designated state use vendors. These items and all other Office Supplies are still purchased through Central Purchasing. Refer to http://www.fhsu.edu/purchasing/State-Use/.

FHSU Guidelines and Procedures

(Continued)

- Professional and consultant service contracts remain the same. Contracts over $25,000 shall be bid by the FHSU Purchasing Office unless determined to be a sole source. (Refer to http://www.fhsu.edu/purchasing/prior-authorization/.)
- The University retains the ability to use State contracts for any and all purchases and should use such contracts if they provide the desired quality of goods at the lowest possible price. State contract vendors should be included in the Informal and Formal Bid Process, if applicable. Please see a complete list of State contracts at http://www.fhsu.edu/purchasing/state-contracts/.
- Travel transactions, including registration, lodging, airfare, etc., follow previously established guidelines. It is important that the PR is approved prior to the trip due to liability Issues.
- The FHSU Vehicle Rental Comparison form is now called Personal Mileage Reimbursement, http://www.fhsu.edu/bus_off/vehicle-comparison/.
- The traveler is not required to use Enterprise. Hertz provides special pricing for FHSU, http://www.fhsu.edu/purchasing/Vehicle-Hertz-Rental-Services/. Compare pricing.
- Use the P-Card for purchases. Check if the vendor accepts the P-Card without extra fees. Some vendors charge an additional 2 – 4% of the initial purchase. Submit an IFAS PR if the vendor charges fees or does not accept the P-Card.

Fort Hays State University Regents Purchasing Program

http://www.fhsu.edu/purchasing/regents-purchasing-program/

Always Best Quality at the Lowest Price!

$0 – $999.99

Office Supplies/Equipment – Central Purchasing - https://bigcat.fhsu.edu/cp/

Staples

$35.00 Minimum Order Required

Other Purchases – No Documentation Required

$1,000 – $4,999.99

LN Price Justification Form

(Purchases Higher than State Contract Price)

Office Supplies/Equipment – Central Purchasing - https://bigcat.fhsu.edu/cp/

Central Purchasing Can Help with All Purchases Under $5,000 . . . Including Wal-Mart!

$5,000 – $24,999.99

Informal Bid Process

LN Informal Bid Form

(Include State Contract Vendors in Informal and Formal Bids, if applicable)

$5,000 and over

Prior Authorization (Sole Source)

LN Prior Authorization

$25,000.00 and over

Formal Bid Process

(Include State Contract Vendors in Informal and Formal Bids, if applicable)

NOTE: Make sure freight charges are included in the price.

NOTE: Check if vendor accepts the P-Card without extra fees.

Purchases $5,000 and Over

Any Purchase $5,000 and over with an Object Code Index Classification of "A" or "B" Requires

Prior Approval by the Purchasing Office

Refer to Lotus Notes Object Code Database for Index Classification

ept Looku ... | Object Code Lookup - ObjcLooku ...

Object	Description	Index
527300	Doctor Fees	C
527300	Optometrist Fees	C
527300	Osteopathic Fees	C
527300	Pathology Fees	C
527300	Physical Examinations	C
527300	Physician Fees	C
527300	Psychiatrist Fees	C
527300	Psychologist Fees (Doctors)	C
527300	Surgeon Fees	C
527500	Advertising Agency Fees	B
527600	Veterinary Services & Fees	C
527700	DJ Services	C
527700	Entertainer Fees (including food)	C
527700	Lecturers Fees	C
527700	Musician Fees, Professional	C
527700	Services (Speaker, Lecturer or Entertainer)--Contractural Services LN form required	C
527800	Accounting Fees	B
527800	Athletics - Audit Fees	
527800	Auditor Fees	B
527850	Banking Investment Svcs	B
527860	Actuarial Services	B
527910	Information Systems Consulting Services	B
527919	Professional Services (Consultants)	A
527990	Abstracter Fees	B
527990	Appraiser Fees	B
527990	Asbestos Abatement	B
527990	Auctioneer Fees	B
527990	Clean Fuel Storage Tanks	B
527990	Collection Agency Fees	B
527990	Collection Fees, Setoff	B
527990	Court Reporter Fees	B

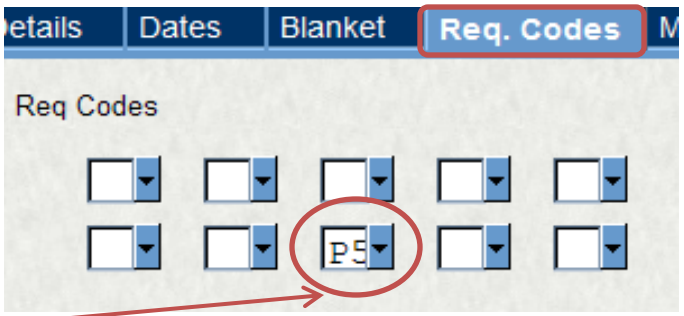
Purchases $5,000 and Over

(Continued)

Contact Purchasing and Complete one of the following . . .

- Informal Bid Form ($5,000 to $24,999.99) OR
- Prior Authorization Form ($5,000 and over) OR
- Process a Formal Bid (over $25,000)

If the Vendor Does Not Accept the P-Card or charges extra fees, Submit a PR and Enter "P5" in Req. Codes Box 8



Purchases $5,000 and Over

(Continued)

Any Purchase $5,000 and over with an Object Code Index Classification of "C" Requires

Prior Approval by the Purchasing Office

Refer to Lotus Notes Object Code Database for Index Classification

Object Code Lookup - ObjcLooku ...

Object	Description	Index
527300	Doctor Fees	C
527300	Optometrist Fees	C
527300	Osteopathic Fees	C
527300	Pathology Fees	C
527300	Physical Examinations	C
527300	Physician Fees	C
527300	Psychiatrist Fees	C
527300	Psychologist Fees (Doctors)	C
527300	Surgeon Fees	C
527500	Advertising Agency Fees	B
527600	Veterinary Services & Fees	C
527700	DJ Services	C
527700	Entertainer Fees (including food)	C
527700	Lecturers Fees	C
527700	Musician Fees, Professional	C
527700	Services (Speaker, Lecturer or Entertainer)--Contractural Services LN form required	C
527800	Accounting Fees	B
527800	Athletics - Audit Fees	
527800	Auditor Fees	B
527850	Banking Investment Svcs	B
527860	Actuarial Services	B
527910	Information Systems Consulting Services	B
527919	Professional Services (Consultants)	A
527990	Abstracter Fees	B
527990	Appraiser Fees	B
527990	Asbestos Abatement	B
527990	Auctioneer Fees	B
527990	Clean Fuel Storage Tanks	B
527990	Collection Agency Fees	B
527990	Collection Fees, Setoff	B
527990	Court Reporter Fees	B

Purchases $5,000 and Over

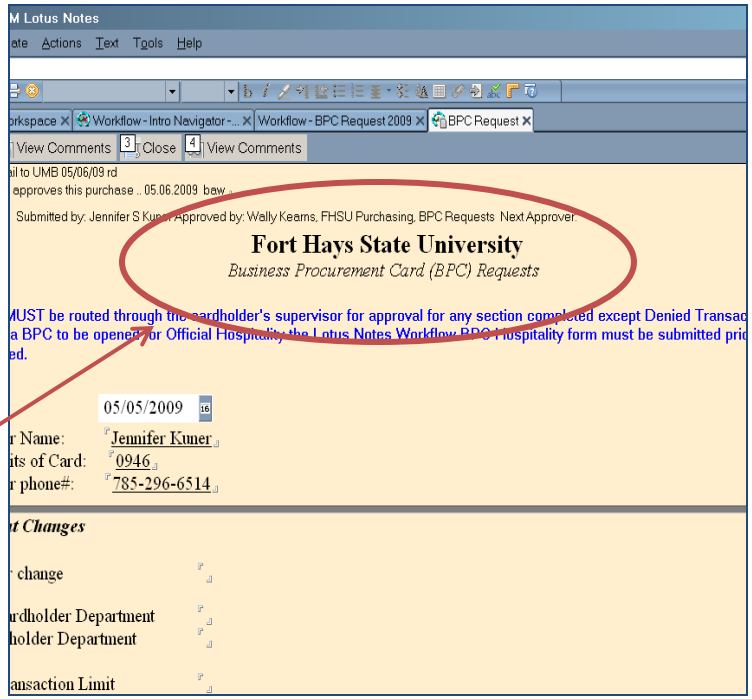
(Continued)

Using P-Card . . .

- Advertising
- Dues
- Subscriptions

Route P-Card Request Form

Through Purchasing



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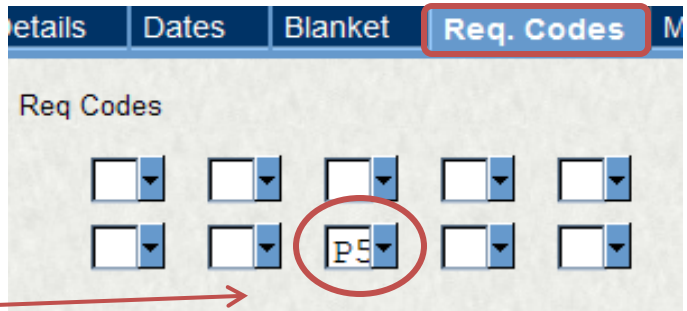


Database Lookups

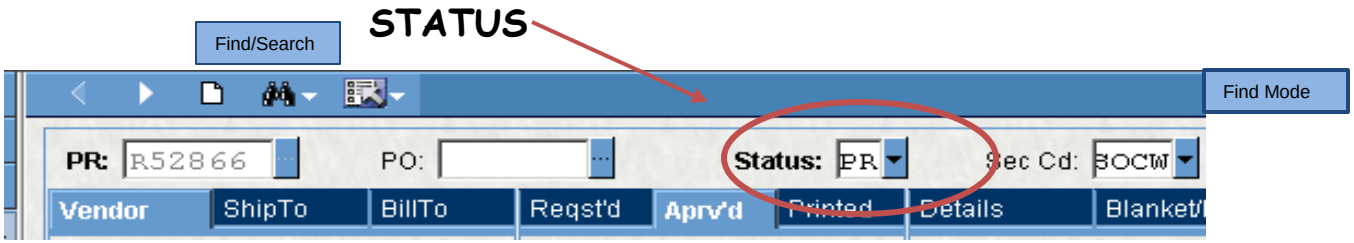
- Contract Lookup
  - FHSU Contracts
  - State Contracts
  - State Use
- Department Lookup
  - Department Account Number and Fund
  - Budget Authority and Backup
- Object Code Lookup
- Registered Vendors Lookup
  - Suggested Purchasing Vendors

IFAS POUPPR STATUS

Each Department or Area is asked to periodically Review the STATUS of the PRs submitted to ensure quick movement of payment to Vendors.

Please go to the POUPPR Screen

Click on the Binoculars, select Find/Search and it will put IFAS into "Find Mode". Type PR,PO (no space between comma) in "Status" and press "Enter" to retrieve all pending (PR and PO) Records.



Using the forward arrow, TAB through the pending Records.
If the status is PR it is waiting on someone's approval. Click the Workflow bar on the left side to show whose name the approval is pending.

IFAS POUPPR STATUS

(Continued)

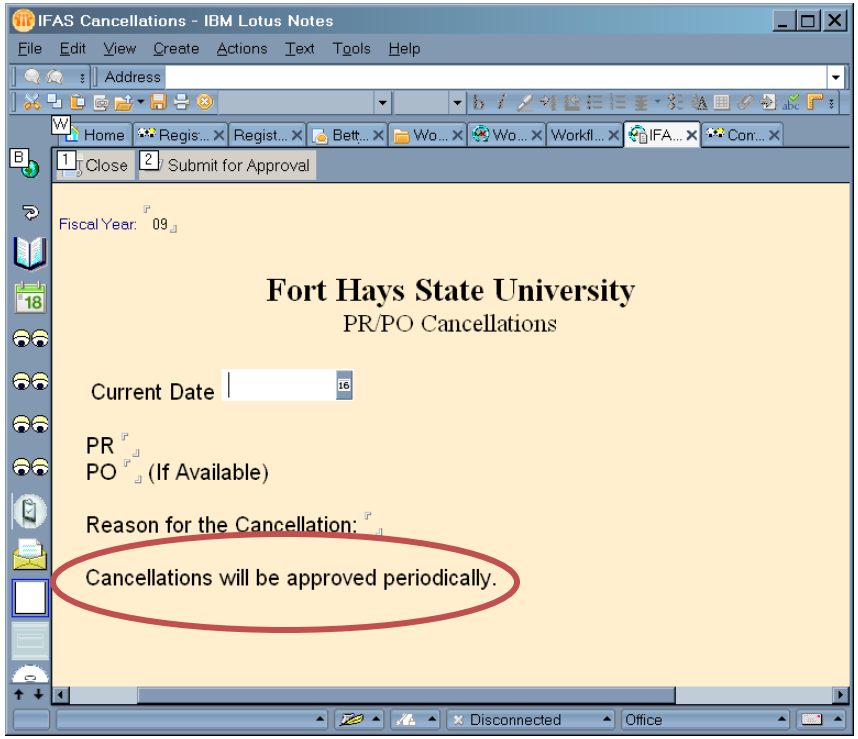
Things to Check if the status is PO . . .

- Has a Receiving Copy been submitted for all PRs with "WAREHOUSE" {Changed to "Delivery Address" by the Purchasing Office} in the Ship To Tab?
- Has the Invoice been lost or never received and the Vendor needs to be contacted?
- Does the "PR or PO" Need to be Cancelled?
  If so, please Process a PR/PO Cancellation Form on Lotus Notes.

If a PO has not been paid within a reasonable amount of time, please call Barb at 4460.

PR/PO Cancellation Form

- Zero No Cost Travel PRs Will be Cancelled by Accounts Payable.
- Submit a PR/PO Cancellation Form for all other Denied PRs and Travel PRs Greater than Zero when no Reimbursement will be Made.



Payments to Faculty, Staff, or Student Employees for Services

(Outside of Regular Job Duties)

Please Contact Tom Kuhn in the Personnel Office PRIOR to Hiring any Faculty, Staff or Student Employee for Payment of Services.

Contractual Services

Individual(s) Providing Service(s) NOT on Any FHSU Payroll

- Complete a Contractual Services Form Prior to the Service to determine if Payment should be made with an IFAS PR or through Payroll.

Complete Either . . .

Part I

Or

Part II

Fort Hays State University

CONTRACTUAL SERVICES FORM

PART 1—SERVICE PROVIDER INFORMATION

PART II—TEACHERS/LECTURERS/INSTRUCTORS

- If Contractual Services Form is Approved - Process a PR for Payment.
- Payment to an Individual Requires Paper Documentation, i.e., Invoice, Contract, or Letter of Agreement. If None is Available, please print the Purchase Order Status Long Form and submit it to the Accounts Payable for payment.

Purchase Requisitions – PRs

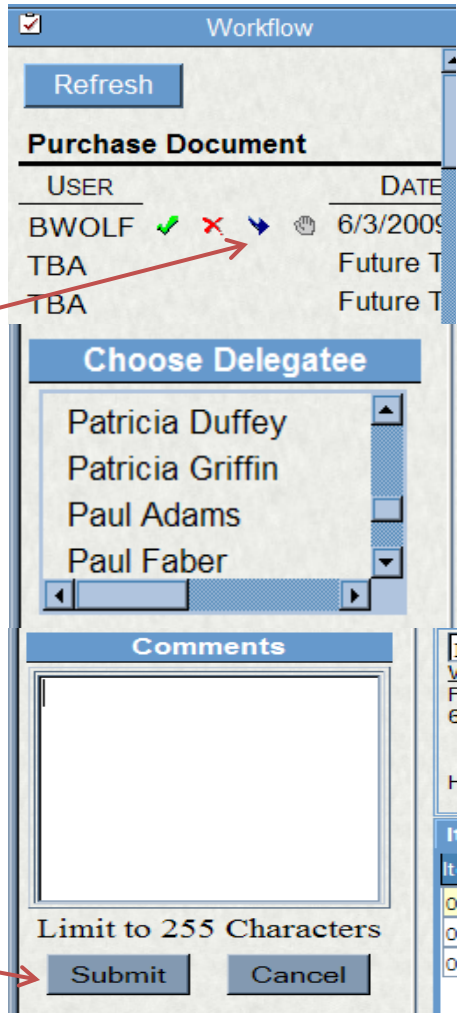
To Forward a PR . . .

NOTE: This is if you want the PR to come back to you.

Click on the Blue Arrow

Select the Name to Forward

Click Submit to Forward PR



An E-Mail Needs to be Sent to the Approver anytime you Select the Blue Arrow!

Purchase Requisitions – PRs

(Continued)

To Reassign a PR . . .

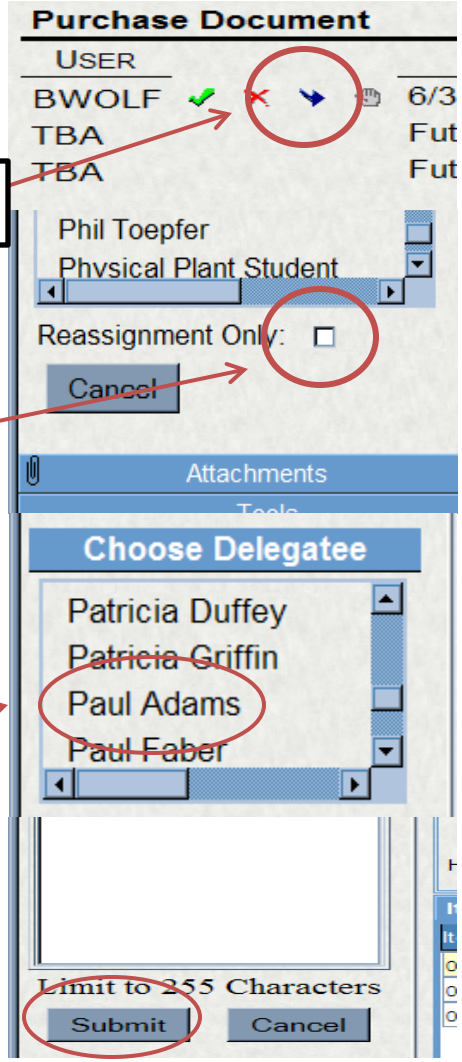
NOTE: This is if you want the PR to go to the next approver.

Click on the Blue Arrow

Click on the Reassignment Only Box

Select the Name to Forward

And Click Submit to Forward the PR

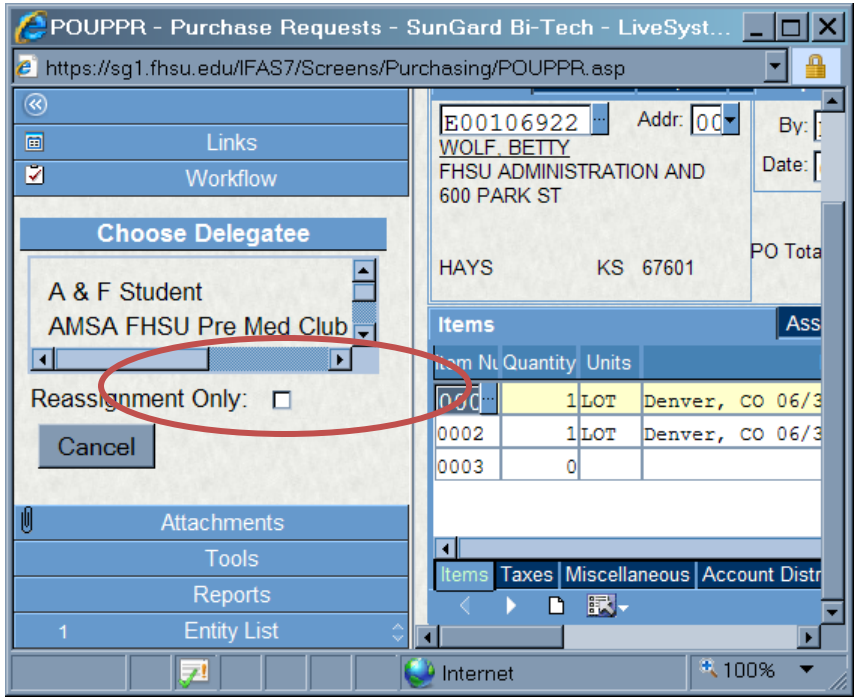


An E-Mail Needs to be Sent to the Approver anytime you Select the Blue Arrow!

Purchase Requisitions – PRs

(Continued)

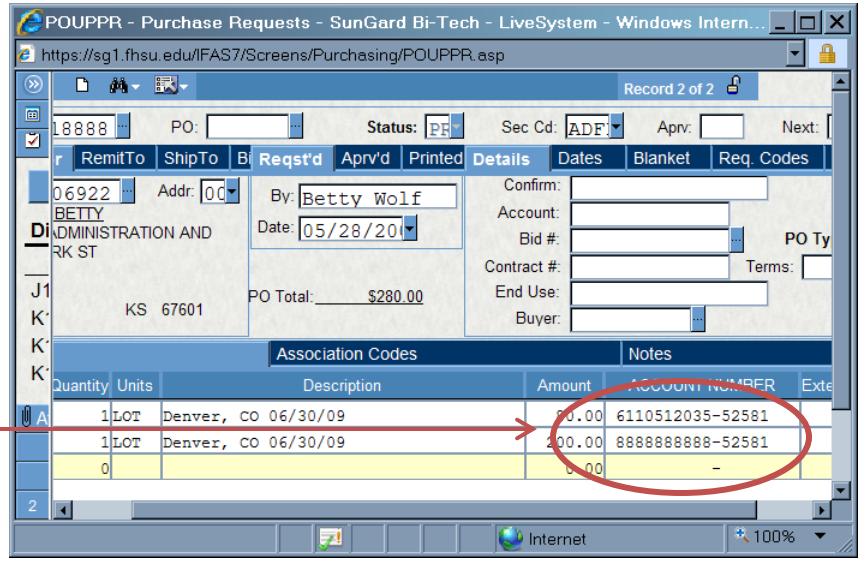
- When a PR is submitted to pay the Budget Authority, the PR must be Reassigned to the Supervisor of the Budget Authority. This can be missed through the Workflow Process if you do not Reassign. Do not assume TV in Box 10 will accomplish this.



Purchase Requisitions – PRs

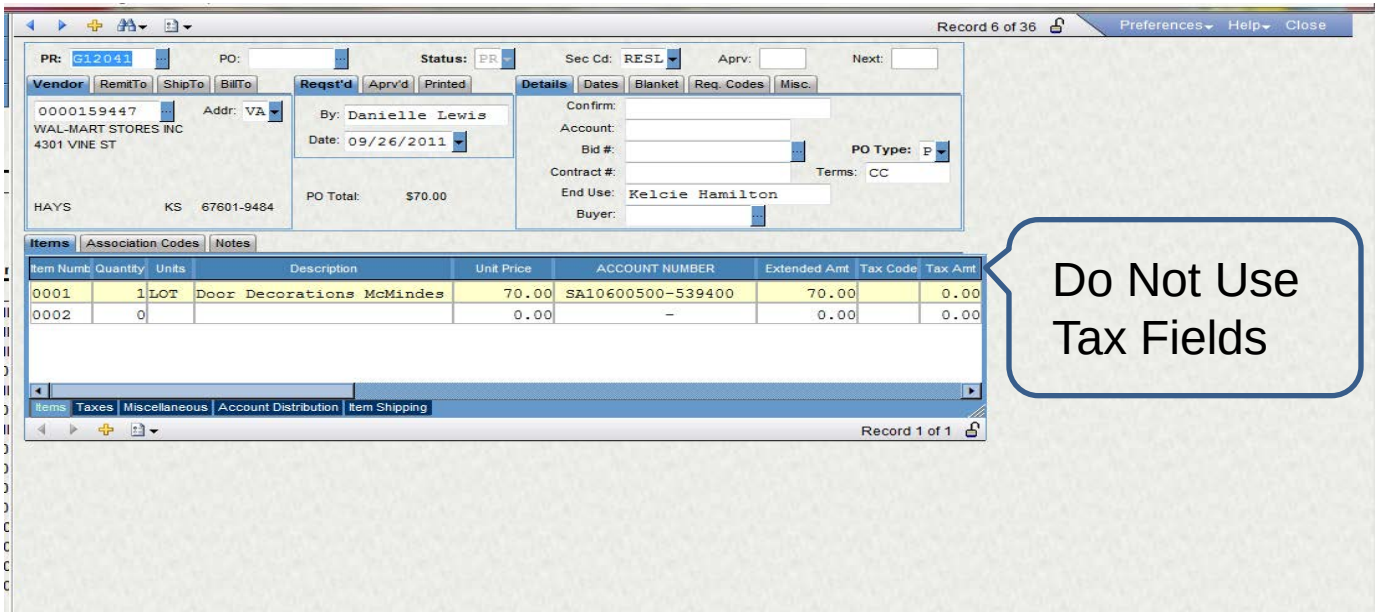
(Continued)

- Please Enter <u>Each</u> Account Number on a Separate Line.
- Use all 8's for Account Numbers <u>Outside</u> your Security Level. Put OrgKey and amount in the Print After Notes.



Sales Tax

When processing PRs for Student Organizations for payments including tax, include the tax with the product unit cost. Do not use any tax fields.



Transportation and Insurance

Qualified Drivers

- Per state regulations, only state employees, including students on payroll, can drive motor pool and rental vehicles on official state business. When requesting a motor pool or rental vehicle, it is each department's responsibility to list qualified drivers on the Transportation Requisition Form or the Rental Agency Contract.
- Non-state employees and students not on payroll can ride in motor pool and rental vehicles only if they are on official state business.
- Candidates are not allowed to use the state rental contracts (Enterprise or Hertz) or motor pool vehicles. Rental vehicles for candidates cannot be charged to the P-Card.
- A driver with a valid driver's license, who is at least 21 years of age, and can show State employee identification will not be restricted to compact or mid-sized car.
- All drivers must be at least 25 years of age to drive a Full Size Van.

Driver's 18 to 21

- Can only rent a compact or mid-sized car.

Enterprise contract:

- 18-20 Year Old Drivers: State of Kansas employees, who are age 18-20, if otherwise eligible, may rent and operate compact and or midsize vehicles under this Agreement only under the following conditions:
  a) Renter must be on official state business.
  b) The car rental must be rented in the State of Kansas.
  c) The State of Kansas will assume full responsibility for any damage to or theft of rental vehicle.
  d) Renter must complete and sign the reverse side of the Enterprise Rental Agreement.
  e) The State agrees to a $5.00/day surcharge on these rentals.
  f) Renter will, under no circumstances, rent or operate a full size van.
  g) Renter will, under no circumstances, operate an Enterprise rental vehicle in the states of Iowa, Connecticut, the District of Columbia, Florida, Maine, Massachusetts, New York, Rhode Island or outside of the United States.
  h) The State agrees to provide automobile liability insurance coverage with limits of at least $250,000 per person; $500,000 per event for all 18-20 year old employees who rent and/or operate rental vehicle. This coverage will be primary to any insurance or self-insurance maintained by Enterprise.

Hertz contract:

- Drivers must have a valid Driver's License and be at least 21 years of age and show State Employees Identification at all locations.

Motor Pool requisition:

- Drivers must have a valid Driver's License and show state employee identification.

12 and 15 Passenger Vans

- FHSU can no longer use 15-passenger vans due to safety concerns by the National Highway Transportation Safety Board. The 15-passenger vans have an extension beyond the back axle which tend to make them top heavy with a higher chance for vehicle rollover.
- FHSU can use 12-passenger vans only. The Motor Pool has 12-passenger vans. If leasing, Hertz is the only vehicle rental place in town that leases 12-passenger vans.
- Enterprise will lease a “12-passenger” van; but in reality, this is a 15-passenger with the back seat taken out. This does not constitute a 12-passenger; this is still considered a 15-passenger.
- Employees should use the P-Card for all rentals.
- Student Activity credit cards may **not** be used to rent from any rental agency.

P-Card / CDW

- When renting vehicles on official state business, it is recommended that employees use the P-Card for all rentals.
- Collision Damage Waiver (CDW) protection is provided by the P-Card when renting cars, 8 passenger vans, and SUV's. The following vehicles are not covered by the P-Card but are covered by Enterprise and Hertz contracts: 9 + passenger vans, cargo vans, trucks, and pickups. Vehicles shall not be rented for off-road use.
- If renting and paying personally, Crash Damage Waiver (CDW) is reimbursable; but Personal Accident insurance (PAI), Personal Effects Insurance (PEI), and supplemental insurances are NOT reimbursable.

Student Organizations

- If making rental arrangements for student organizations, rental agencies should be told that student organizations are not part of the State of Kansas procurement system. Student Organizations are not covered by the university's automobile coverage and will be responsible for any damages incurred.
- Student Activity credit cards may **not** be used to rent from any rental agency.
- SGA Allocations may use a P-Card to rent, provided students are qualified drivers.

Complaints and Accidents

- Contact the Purchasing Office for instructions.

Thank You!

If you have any Questions, please contact Purchasing at 628-4250 or 628-4463

10/12/2011