



ARKANSAS STATE
UNIVERSITY

Procurement Training for End Users

Revised July 2019

PROCUREMENT TERMS

Requisition - An internal document by which a department requests Procurement Services to initiate a purchase.

Initiator/End User – The person who enters a requisition into the Banner system.

Approver – The person who approves requisitions in the department (ex. Dean, Chair, VC)

Purchase Order – An external document issued by Procurement Services using the requisition to order items or make payment to a vendor.

Order Requisition – A requisition for items that are to be ordered or have a quote. This type of requisition is used to place an order for items the department has not received. *Previously known as a non-confirming requisition.*

Payment Requisition – A requisition to pay an invoice or reimbursement. *Previously known as a confirming requisition.*

Blanket/Standing/Open Order – A requisition to pay for goods/services during the fiscal year or up to a maximum dollar amount. Invoices will be paid against the standing order over the entire fiscal year.

Quote – A formal statement from a potential supplier/vendor to supply goods or services at a specific price within a specific period. Processed by an order requisition.

Invoice – A bill for payment submitted to a buyer from a seller. Invoices are processed using a payment requisition or against an existing purchase order.

Vendor – A supplier of a good or service.

Commodity – A product or service provided by a vendor.

VPAT – Voluntary Product Accessibility Template – this form is required for technology purchases.

IT Questionnaire – An IT Data Security, System Performance and Service Reliability form must accompany VPAT with technology orders.

State Contract – A contract issued by Office of State Procurement. Some are mandatory, some are not. Items purchased from State Contracts do not have to be bid. They also do not require a VPAT.

Cooperative Contract – A contract issued by two or more governments sharing procurement contracts. Examples include E & I Cooperative, TCPN, Sourcewell, US Communities, NIPA, NASPO, TIPS.

Document Text – Text in Banner that pertains to the entire requisition. Ex. Quote Number, Notes to Procurement, State Contract Numbers, etc.

Item Text – Text in Banner that pertains just to a specific item. Each line item has an Item Text field. Ex. Make/Model/Item number of that specific item.

PROCUREMENT POLICY AND GUIDELINES

PURCHASING AUTHORITY

The Procurement Official is the sole purchasing authority of the University. Purchases not authorized by this authority are not legal obligations of the University. **Any individual making a purchase without proper authority first being given is assuming a personal obligation to the vendor for whom he/she may be held personally liable.** The department, and those within the department, **are not authorized** to sign contracts, agreements, terms and conditions or other required paperwork from a vendor. These must be sent to Procurement Services! The only exception is Sodexo event forms for your department.

CONTRACT/AGREEMENT TIMELINE

If your department has a contract, agreement, or terms and conditions that require a signature, please send these to Carol Barnhill – cbarnhil@astate.edu. Some contracts require legal counsel review, which take 15 business days or more to process. Please do not wait until the last minute to send a contract in for signature. Some contracts will take longer to process and cannot be rushed or expedited.

PURCHASE REQUEST PRIOR TO ANY COMMITMENT

Accountability is a must; documentation must be approved by the ASU Procurement Services Department prior to any commitment that would result in the expenditure of funds. Caution should be used by individuals when researching or otherwise inquiring about services or products with any vendor. A simple conversation can sometimes be interpreted as an obligation by a vendor/contractor.

TRADEMARKS

All items purchased with ASU trademarked logos, must be purchased from a licensed vendor. The list of current licensed vendors can be found on the Procurement Service's website and is updated monthly.

BID THRESHOLDS

Most goods and services totaling \$20,000 or more require a bid process.

- Competitive bidding (\$20,000.01-\$75,000) – requires 3 quotes in writing
- Competitive sealed bidding (\$75,000.01+) – must be sent to Procurement to bid
- All sealed bids are advertised on the ASU Procurement Services website.
- State and Cooperative contract items do not have to be bid.
- Certain bids have to be sent to Little Rock for approval and may take longer to process the order.
- Note: The threshold includes the freight amount but not sales tax amount.
- Purchases may **not** be split to avoid bid limits
- *Act 1080 of 2017 allows no bid procurement up to \$40,000 if from a certified minority business or certified woman-owned business.

STATE AND COOPERATIVE CONTRACTS

State Contracts and Cooperative Services have been established to provide lower costs for higher education. Please utilize these contracts when possible.

<http://www.astate.edu/a/procurement/procurement-contracts.dot>

MANDATORY STATE CONTRACTS

The Office of State Procurement has exclusive authority to issue bids for some items, resulting in contracts that are mandatory:

- Passenger motor vehicles
- Ammunition
- Copier Lease
- Tires

Mandatory/non-mandatory state contracts can be found on the OSP website at <https://www.dfa.arkansas.gov/state-contracts>

PRINTING

All printing, regardless of cost, must be procured through a state operated printing facility such as ASU Printing Services, on State Contract, or thru bid procedures handled by Procurement Services.

TRADE-INS

The Office of State Procurement in Little Rock requires approval for trade-ins. The department is not to allow any trade in of equipment to a vendor without the approval from Procurement Services and the Office of State Procurement in Little Rock. Email Procurement Services when your department has a trade-in request.

INSURANCE REQUIREMENTS

Vendors that perform any type of work on the campus of Arkansas State University are required to meet specific insurance requirements depending on the scope of work to be performed. Evidence of insurance must be provided before performing the work. Insurance requirements can be found on the A-State Business Services and Risk Management website <http://www.astate.edu/a/business-services/>, or you may contact the Office of Risk Management risk@astate.edu if you need assistance.

CENTRAL RECEIVING/RECEIVING FREIGHT

Products ordered must be picked up or delivered to an authorized University address only. Products may not be delivered to a personal residence unless authorized by the appropriate Dean, Chair, or Vice Chancellor.

SPEAKER/GUESTS EXPENSES

We ask that you do not allow a speaker or other University guests to set up their own hotel and flight reservations. The department should do this with their departmental card. There are special state rates for some local hotels. Some departments require a guest of state memo to be completed. Please check with Procurement to see if this is required.

W-9 AND VENDOR INFORMATION REQUEST FORMS

It is required that Procurement have a completed new vendor packet (found on Procurement's website) from all new vendors before they will be entered into Banner. The department is responsible for securing these forms from the vendor. **Do not send this information by email!! Personally Identifiable Information such as W-9, social security number and date of birth should be submitted using ShareSpace.**

INITIAL EQUIPMENT PURCHASE

“Equipment” as defined for inventory purposes is “all tangible property with a total unit cost of \$5000 or more and a normal usage of two (2) years”. When “equipment” is purchased, an asset account must be used on the requisition. Items with a total unit cost less than \$5000 may require special consideration if they are part of, or used with a group or set. Purchases for equipment should not be combined with supply items on a requisition. Contact Billy Hogue- bhogue@astate.edu - regarding inventory of asset purchases.

INDIVIDUAL MEMBERSHIP & LICENSES

In the event that a membership or license is in the name of an individual, the appropriate Vice Chancellor or Chancellor must approve the membership. A signed memo from the VC or Chancellor must accompany the requisition before it will be processed for payment. This policy can be found on Procurement’s website at

<http://www.astate.edu/a/procurement/procurement-services/>.

Institutional Memberships do not need approval since they are in the University’s name.

RELOCATION ALLOWANCE FOR NEW FACULTY AND PROFESSIONAL STAFF

Arkansas Code 19-4-522 allows the payment of employee moving expenses from state funds by institutions of higher education. Arkansas State University may pay an amount equivalent to up to 10% of the annual salary in moving expenses for new faculty or professional staff employees. The President, Chancellor, or a Vice Chancellor may authorize payments greater than this amount. The terms of agreement for payment of moving expenses should be included in the letter of appointment. The University’s obligation applies to the movement of a "household" and does not constitute a separate allowance to each member of a family employed by the University.

A. Allowable Costs:

1. Moving the employee's household goods and personal effects.
2. Travel, including lodging but not meals, from the former residence to the new residence. This includes one night of lodging upon arrival at the new home destination. Subsequent nights of lodging are the responsibility of the employee.
3. Since it is often more economical to ship books by parcel post, individuals should investigate this possibility and should keep receipts to submit with their request for reimbursement.
4. If the faculty or professional member elects to move himself/herself (UHaul, etc.) rather than utilizing commercial movers, receipts should be kept for vehicle or trailer rental charges, gasoline and oil purchases, toll charges, and special labor charges (other than the faculty or professional himself/herself) required in assisting with loading and unloading.

The University does not share in the following costs:

1. Storage of personal effects at either end of the move.
2. Additional insurance coverage over and above than normally carried by commercial moving companies.

3. Moving of household effects and personal books, not professional books, from an address other than the home address from which the individual is moving.
4. Any subsequent moves from temporary to permanent housing not made within 6 months of the original move, nor agreed to upfront in writing as part of the employment offer.

The University has contracted with a moving company, whose use is preferred, but not mandatory. Move scheduling should be done as soon as possible upon acceptance of employment, within one year from start of employment. If the University's contracted moving company is not used, three written moving estimates must be secured, one being from the contract holder, and justification provided if the firm with the lowest estimate is not selected.

Payment will be made directly to the moving company by the university, or reimbursement for moving household goods and personal effects may be made to the employee, up to the amount authorized for the move. Original receipts are required for all reimbursements.

Procurement Services will not resolve any problems encountered with any moving companies other than the vendor ASU has a contractual agreement with. If other moving companies are used, the employee may not have adequate protection for damage or leverage required to resolve problems. Regardless of how the employee manages a household move, moving expense payments to vendors of ASU employees must follow University Procedures.

During the move, the moving company may ask for guidance from the employee being moved. The employee being moved must understand that verbal instructions to the moving company may constitute a contract. ASU will not pay for verbal charges outside the written contract, and the employee will be solely liable. The moving employee needs to exercise caution to avoid this personal additional expense. When in doubt concerning a request from the moving company, call Procurement Services at 870-972-2028 for assistance.

THE FOLLOWING STEPS SHOULD BE FOLLOWED WHEN HOUSEHOLD GOODS MOVING SERVICES ARE REQUIRED.

1. Inform your new employee in writing of the allotted amount the department is willing to pay for moving expenses and of the university preferred provider.
2. If the new employee does not wish to use the preferred provider they must attain three bids. Once they have received the cost estimates and selected the moving Company, they should contact their ASU department with the information. The department should then follow through with an approved requisition to Procurement Services with the following information:
 - A. Name and phone number of employee moving;
 - B. Name of contracted moving company and quote number, if applicable
 - C. Date of move and any pertinent particulars needed to ensure a successful move;
 - D. Copies of three estimates, if not using the preferred provider. If the employee is using the preferred provider, they should get a written

quote for submittal, and assure that it is within the authorized budget before the move takes place. Any questions should be directed to Procurement Services before the employee signs the contract.

E. Location employee is coming from and moving to.

3. For detailed information on Moving Expenses, see Federal Publication <http://www.irs.gov/publications/p521/ar01.html>

CONFIRMING ORDERS – (NOW KNOW AS PAYMENT REQUISITIONS)

A confirming order, now known as a payment requisition, acknowledges that an employee made a purchase on behalf of the University without first securing the appropriate internal approvals and without using a University authorized procurement method (i.e. valid Purchase Order, PCard, or existing signed and valid University contract). **This is a violation of University policy if not approved by Procurement Services.**

Procurement Services will no longer accept confirming order requisitions unless they are on the approved list below or permission has been given prior to the purchase.

We encourage departments to use their PCard or process an order requisition to eliminate confirming/payment orders.

NOTE: The department is responsible for ensuring all staff are made aware purchase orders are required before goods or services may be ordered or received. Lack of knowledge of proper procedure is not grounds for the approval of after-the-fact requisitions. The use of Foundation funds or the employee's personal funds may be required to pay the cost of an unauthorized purchase.

Although the items and services noted below are allowed on a payment requisition, if a supplier requires a purchase order or needs a contract signed by A-State, the employee will need to request a contract/purchase order through the normal requisition process. This is not an all-inclusive list of allowed items. **Permission will be given on a case-by-case basis.**

- Accreditation fees
- Student action funds
- Advertising
- Building Leases / Rentals
- Cadavers for Gross Anatomy laboratory
- Charitable donations
- Conference registrations
- Equine supplies (bedding, hay, feed)
- Exams
- Freight Charges: Fed Ex/ UPS
- Food purchases when not using Sodexo
- Homeland Security fees as required by the Federal Government
- Insurance payments
- Internet Charges
- Livestock auctions

- Lodging
- Medical services for student athletes
- Medication for athletes
- Memberships & Registrations (fees for professional organizations and events)
- Non-duty Stipends/ Scholarships/ Fellowships – to the exclusion of honoraria, for which Purchase Orders are required.
- Parking fees
- Postal services via the US Postal Services (stamps, meters, packaging)
- Publication charges/ Page charges/ Scientific reprint fees
- Subscriptions and Renewal Subscriptions
- Temp Labor/Officials/Security
- Utilities (water, electric, sewer, gas, refuse disposal)
- Veterinarian services, including medication for farm animals

REQUISITION GUIDELINES

DESCRIPTION AND DATA STANDARDS

The following guidelines should be followed when entering descriptions on requisitions:

- Descriptions should begin with a **noun** followed by additional information. (Example: *Pens, Pilot Gel, Black, Item No. 135972A*) (Ex. *Phone Service, Invoice No. 1234*).
- It is **VERY** important to use mixed-case letters.
- Do **NOT** use symbols such as @, #, %, &, /, _.
- If you have a quote number or name of person who quoted the item/service, enter it into **Document Text**.
- **Commodity codes will be required on all requisitions.** Requisitions that do not have a commodity code will be returned to the department. The commodity code will generate a generic description. Delete the generic description and type the vendor's description of the item instead. Do not use the generic commodity description for the item's description.
- Orders for any type of contract items, must have that information on the quote. If the contract number is missing on the backup work, contact the vendor and ask for a revised quote/invoice with the contract information
- State or any cooperative contract numbers should be entered on line 10 of Document Text. Contract numbers should appear like the example below:
CNR-01499
SP-15-1699
- You must itemize order requisitions using the quote. If the description on the quote is not clear, it is your responsibility to provide the full specifications (with the exception of Dell e-quote descriptions). Shipping is a considered a commodity and should be on a separate line description.

Note: Document Text should be used when the information refers to the entire requisition (ex, quote number, state contract number, notes to Procurement, new vendor Info). Item Text should be used to refer to a particular line item (make/model, product/item numbers, information that did not fit on description line).

SUPPORTING DOCUMENTATION

Supporting documents are required for the following types of requisitions:

1. Quotes
2. Invoices, receipts
3. Sodexo contracts
4. Any other agreements/contracts/terms and conditions
5. Travel reimbursement (copy of the TA required)
6. Off/On Campus Food forms required for reimbursement of food not purchased from Sodexo.
7. VPAT, Disability Services Product Accessibility Report, and IT Security Questionnaire for technology purchases.

The requisition number should be written on the documents in clear and legible ink in order to allow for quicker processing. **Copies of banner screenshots are not required.**

Procurement Services will accept scanned PDF copies of the documents. Scanned copies should be sent to procurement@astate.edu.

Departments are responsible for retaining the original documents for at least two years.

SHARESPACE

Personally Identifiable Information such as W-9, social security number and date of birth should be submitted using ShareSpace. Do not send this information by email!!

Instructions for ShareSpace are available online:

<https://webapps.astate.edu/sharespace/>.

OFFICE SUPPLY PURCHASES

The Office of State Procurement has issued a non-mandatory office supply contract. Office supplies do not have to be purchased from the contract, but the department will benefit from the cost savings by using one of the following sources:

Staples – Cooperative Contract – E & I - online purchases
Office Depot – State Contract - online and in-store purchases

You may purchase your office supplies by an order requisition or P-Card.

Do not order toner or printers. Arkansas State has partnered with Xerox Services to deliver best in class services and technology to optimize our printing, copying, scanning and faxing needs. Colleges, departments and offices won't need to worry about replacement printers or toner orders.

A minimum purchase of \$50 is required when using the office supply websites for PO's and P-Cards. Purchases made in-store have no limit requirements.

If you do not have a user name or password for these websites, email your contact information to procurement@astate.edu

Once you have obtained your user id and password, please use the correct website in order to receive the contracted prices.

Staples – <http://www.StaplesAdvantage.com>
Office Depot– <https://epsprocure.e-procurementservices.com/osp/oc>

If you have any questions, feel free to contact Procurement Services at 2028.

AMAZON ORDERS

Amazon purchases are allowed on the P-Card. Amazon does not accept purchase orders. ASU employees must use the Amazon Business Advantage website and not their personal account to order for the University. To get setup on Amazon Business Advantage, contact Nanya French at nfrench@astate.edu.

TECHNOLOGY PURCHASES

All technology purchases must be accessible to the visually impaired. This includes new technology purchases and software renewals.

A VPAT (Voluntary Product Accessibility Template) on most purchases will be required to verify the purchase is compliant with Arkansas law.

***The department is not required to obtain a VPAT from a state/cooperative contract items (ex. Dell).

Software cannot be purchased via the P-Card unless approved in advance to verify that it meets the requirements.

Software Purchases

Contact Shane Johnston in ITS at 972-3033 and then Eric Jones (vpate@astate.edu) in Finance and Administration at 972-2005 for VPAT reviews. The initiator will submit an online requisition to the vendor, follow VPAT rules and procedures and complete the [IT Security Questionnaire](#).

- The requisition will not be processed until Procurement Services receives the approved VPAT and the completed IT Security Questionnaire.
- The IT Security Questionnaire must be completed and signed by the vendor as well as Timothy Cureton tcureton@astate.edu or Henry Torres htorres@astate.edu in ITS before it is considered complete.

Audio/Visual Equipment, Cisco Desktop Phone, and Digital Signage, TV Purchases - Contact David Engelken in ITS at 972-3033.

Cell Phone, MIFI and Data Plans (for iPads) - Contact Leigh Anne Hall in ITS at 972-3033. You may also go to <https://astate.easyvista.com> and log in and put in a Service Request for what you need.

FOOD PURCHASES

Food Purchase Requests

Departments must complete the Food Purchase Request form when using state funds to purchase food not provided by Sodexo, Inc., our Dining Services vendor. The form is not required when food is purchased using A-State Foundation or Student Agency funds.

- On-Campus facilities include all buildings on the Jonesboro campus with the exception of the Judd Hill Center.
- Off-Campus facilities include restaurants, parks, and other establishments not on the Jonesboro campus.

On-Campus Official Functions

- Food purchased for an on-campus function should be purchased through Sodexo, Inc.
- The Food Purchase Request form must be approved by Sodexo, Inc., **PRIOR** to ordering from an off campus vendor.

Required Approvals

- All food purchase requests for off-campus official functions must be approved by the department head, chair, dean, and vice chancellor **PRIOR** to the event.
- Once Sodexo, Inc., has approved the request, the department can submit a requisition for approval, along with the Food Purchase Request form.

The Food Purchase Request form is not required for the following purchases.

The function must be documented on the requisition or p-card log.

- Food purchases provided by Sodexo
- Classroom experiment food
- Coffee & supplies for University guests only
- Candy for community fairs, recruitment trips, and other University functions. Candy for the department is not allowed.
- Meals outside of Jonesboro

For more information, see Operating Procedure 05-09 and the Food Purchase Request form on Procurement Services' web site.

ON-CAMPUS PURCHASES

On campus purchase instructions can be found on the Procurement Service's website.

Click on Requisition Information



PROCUREMENT SERVICES



Click on On-Campus Purchases

ARKANSAS STATE UNIVERSITY [Giving](#) [Library](#) [Athletics](#) [News](#) [Calendar](#) [myCampus](#) [A-Z Index](#)

STATE [ADMISSIONS](#) [ACADEMICS](#) [CAMPUS LIFE](#) [RESEARCH](#) [ABOUT A-STATE](#)

INFO FOR: [FUTURE STUDENTS](#) [CURRENT STUDENTS](#) [PARENTS](#) [FACULTY & STAFF](#) [ALUMNI](#) [COMMUNITY](#)

HOME
PROCUREMENT SERVICES
REQUISITION INFORMATION

- Bids/RFP/RFQ & Results
- Campus Credit Cards
- Contract Administration
- Forms
- Frequently Asked Questions
- Requisition Information
- State & Cooperative Contracts
- Staff
- Vendor Information
- Xerox Services

REQUISITION INFORMATION

BANNER REQUISITIONING INFORMATION

- [Training Guides](#)
- [Commodity Codes - Updated 2/20/2018](#)
- [Vendor Quicklist - Updated 08/22/2018](#)
- [On Campus Purchases](#)

See the FAQ page for more information.

Choose the department for your order requisition

ARKANSAS STATE UNIVERSITY [Giving](#) [Library](#) [Athletics](#) [News](#) [Calendar](#) [myCampus](#) [A-Z Index](#)

STATE [ADMISSIONS](#) [ACADEMICS](#) [CAMPUS LIFE](#) [RESEARCH](#) [ABOUT A-STATE](#)

INFO FOR: [FUTURE STUDENTS](#) [CURRENT STUDENTS](#) [PARENTS](#) [FACULTY & STAFF](#) [ALUMNI](#) [COMMUNITY](#)

HOME
PROCUREMENT SERVICES
ON-CAMPUS PURCHASING

- Bids/RFP/RFQ & Results
- Campus Credit Cards
- Contract Administration
- Forms
- Frequently Asked Questions
- Requisition Information
- State & Cooperative Contracts
- Staff
- Vendor Information
- Xerox Services

ON-CAMPUS PURCHASING

INFORMATION AND TECHNOLOGY SERVICES	+
PRINTING SERVICES	+
PARKING SERVICES	+
DINING SERVICES/SODEXO, INC. AND AFFILIATES	+
FACILITIES MANAGEMENT	+
UNIVERSITY POLICE	+
A-STATE BOOKSTORE - FOLLETT	+
FIRST NATIONAL BANK ARENA	+
PUBLICATIONS AND CREATIVE SERVICES	+
ALUMNI ASSOCIATION	+

PROCUREMENT WEBSITE

The Procurement Service's website has all the Procurement information, forms, state and cooperative contracts, and links posted. The webpage is kept up to date and we strongly encourage you to visit our website and look around.

Our website is <http://www.astate.edu/a/procurement/>

HOME

PROCUREMENT SERVICES

Bids/RFP/RFQ & Results

Campus Credit Cards

Contract Administration

Forms

Frequently Asked Questions

Requisition Information

State & Cooperative Contracts

Staff

Vendor Information

Xerox Services

DOING BUSINESS WITH ASU- JONESBORO

*Doing Business With ASU-
Jonesboro Information*

NOTICES & REMINDERS

*Procurement Findings and
Recommendations Report*

Operating Procedures

Procurement Procedure

Handbook - revised

06/11/2019

Licensed Collegiate Vendors

PROCUREMENT SERVICES



Procurement Services' mission is to provide the University with services that effectively and efficiently respond to the campus's operating needs.

CONTACTS

PROCUREMENT@ASTATE.EDU

Procurement Services has experienced some changes in the past year. Below is the contact information for questions:

Carol Barnhill, C.P.M., CPPO, APO - cbarnhil@astate.edu - 870-972-2122

- Major issues for Procurement
- Contracts, terms and conditions, agreements
- Leases, copiers, BIDs, RFPs
- Vehicle purchases

Lisa Glasco, CPCP, CPPB, CPPO - lglasco@astate.edu - 870-972-3449

- Bids, RFPs, change orders, PO's, requisitions
- State and Cooperative contracts
- Procurement website
- Vendor questions
- On-Campus purchases questions
- Procurement training
- Banner Questions

Nanya French - nfrench@astate.edu - 870-972-3445

- Requisitions, Banner questions
- Backup documentation
- W9 – New Vendor Packet Information
- P-Card backup
- Amazon Business Advantage setup
- Office Suppliers setup
- Enterprise Rental Cars

Mike Smith - mismith@astate.edu - 870-680-4230

- P-Cards
- P-Card training
- Banner Questions
- Requisition Questions

Travel and Departmental Cards

Garry Patterson in Accounts Payable – gpatterson@astate.edu – 870-972-2333 is responsible for Travel and Departmental Cards.

International Vendors

Contact Fran Lincoln in Treasurer's Office - flincoln@astate.edu – 870-972-2285