

Purchasing Forum
April 28, 2009

Business Procurement Card –

- Annual Knowledge Validation – will consist of 10 questions and owners and enterers must score 80% or better. Those less than 80% will be allowed to re-take. If 2 successive results less than 80% scoring, then the card will be suspended until class is re-taken.
- Conference Registrations – Reminder that if you're paying for extras that are not allowed, private funds must be submitted for that portion. The procedures for using the BPC card for Conference Registrations are attached and can also be found on the Purchasing website.
- Paypal – Requires approval from BPC Coordinator, Peggy Davis, prior to purchase. Make sure your email includes all pertinent information.
- Recently, Legislative Post Audit recommended using the BPC for all purchases from Corporate Express, Dell, AT&T, Fisher Scientific, Grainger, Cartridge King, Alltel, Stanion Electric and FedEx. Currently, KUMC only mandates use of the card with Corporate Express/Staples. However, you are strongly encouraged to use the BPC for appropriate items whenever possible. It is less costly to process a BPC transaction than a Requisition/Purchase Order/Voucher/Warrant. If in doubt if an item is an allowable BPC purchase, please contact the Purchasing BPC staff. If you want it in writing, email them and they will respond back. If a PA is required, fax to Purchasing and if approved, it will be faxed back.

Copiers –

- Existing contract with Century United expires August 31, 2009. Meter readings of existing copiers will be due at the end of June, July **and** at the end of August or when the machine is picked up. Requisitions will need to be entered for July and August. To determine your dollar amount, use the current FY dollar amount, divide by 12 and that should be your monthly amount.
- Please check your existing copier for any scanned documents that have been stored in the memory and delete them. This is for KUMC security so that confidential or sensitive information is not in the memory when the machine is returned. You may have documents stored that you're not aware of. On the Savin Model 2535, you would select the Document Server button. If there are files stored, they should show up there.
- New contract has not been awarded so vendor, make, models and pricing is unknown at this time.
- Requesting that the new vendor bring models to KUMC for a day so that you can look at them and decide which copier will meet your needs for the lowest price. This is a perfect opportunity to scale back the number of copiers in your department and to not "over-buy".

Close of Fiscal Year –

- Applies only to purchases using funds that process through the State Treasurer, not Research Institute.
- Any purchases or services required in FY09 over \$10,000.00 require competitive bidding. The deadline for those is May 1. Contact Steve Scanlon for assistance.
- Letter will be going out about May 7 with established dates to allow processing of orders and closing out fiscal year 2009 in Peoplesoft.

Purchasing Website –

- Purchasing has added a couple new features on our website. Please check them out. Our website is: <http://www2.kumc.edu/finance/purchasing/index.html>
- Click on "Contracts" and another link for "New/Renewed Contracts" takes you to those contracts that have recently been established or renewed. More information is provided here than in Contracts.
- Another new area is for "Bid Opportunities" which shows bids being done locally or through Division of Purchases for KUMC.
- Under "Forms" the Contractual Provisions Attachment Form, DA146a, with a signature line for the vendor to sign is now available. Previously, we would indicate to vendor to just sign anywhere on the form.

Corporate Express/Staples –

- Please consolidate your orders as much as possible. It's much more efficient to process an order with several items and a large dollar amount rather than one item per order. All orders are to be processed via E-Way and be charged to the BPC, except Privately Funded orders. If you require a custom item that cannot be ordered through the shopping cart, written communication from Corporate Express/Staples will be required indicating the order is to be placed via purchase order.
- On the Home Page of E-Way, under Cartridge King, there is a new link called "Cartridge King Inquiry". This is an area that you can indicate any service issues with the Cartridge King product.

Office Supply Store –

- A new item has been added, the Fisher Brand sharpie pen. It's available in Black fine and extra fine point. Sold as each. These are good for writing on slides, etc. These pens are considered a Hazardous Item during shipping and you may have been charged a hazardous fee when ordering direct. These are being stocked as a convenience for you so that you may order by the each, rather than a box, and avoid hazardous fee charges. If the pens sell, then it will be stocked permanently. If they don't sell, then they will be removed from the inventory.

Blanket Orders –

- When entering a requisition for a blanket order, it is a requirement that you enter the dollars you expect to spend as the quantity, with each as the unit of measure, and \$1.00 as the amount. Then when you need to receive against a shipment, you receive the dollar amount that you need to pay the invoice.

Change Orders –

- When requesting any type of a change to an existing purchase order, i.e. quantity, dollar amount, canceling a line or canceling the entire purchase order, you **MUST** indicate a reason for the change. Purchasing will be returning any change requests that do not provide a reason why.

Shipping Charges –

- Existing contracts indicate if there will or will not be freight charges. If in doubt, contact Bruce Townzen in Purchasing for assistance in reviewing the contract.
- For purchases that are not on a contract, when you contact the vendor for pricing you **MUST** always ask if that price includes freight. If there will be freight charges, make sure you have a line on the requisition for freight. If the freight charge is unknown, then describe it as "Estimated Freight Charges".
- If you're purchasing an item from a contract and there is no freight, but you've added another item from the same vendor that is **NOT** a contract item and freight will be added for that item, indicate the specifics in the comments.

Laboratory Supplies –

- There are now 2 contract vendors for Laboratory Supplies and Equipment. The existing contract with Fisher Scientific remains unchanged. A new contract with VWR, #12140, has been established for the Regents Institutions to purchase from. Please check the contract for contact name to get an account set up.

Being "Green" –

- Purchasing receives many faxed pages of unnecessary paperwork. If the documentation you're faxing us is for a requisition or BPC transaction, just indicating that number on the page is acceptable. We do not need a fax cover sheet. Also, if you've indicated the requisition number on the paperwork, then it's not necessary to fax us a printed copy of the requisition. If you're providing special instructions to us, then a fax cover sheet with those instructions is appropriate.

Procedure for using BPC card for Conference Registrations

1. Determine if you have all the necessary information
 - a. Name of conference
 - b. Dates of conference
 - c. Location of conference
 - d. Names of attendees
 - e. Which meals are included if any
2. Pay registration with BPC card
3. Make appropriate entry in BPC log in PeopleSoft
 - a. All of the information in item 1 above must be entered in the comment section of the BPC log entry.
 - b. Object codes to be used with conference registrations are:
 - i. In-State – 2591
 - ii. Out-of-State – 2592
 - iii. International – 2593 (See below for additional information)
4. Enter a Travel Request in the PeopleSoft travel module
5. On the Seminar panel, in the Travel module, Select the BPC radio button and then enter the BPC transaction ID in the BPC Id: field. (See screen shot below).
6. *If this is a local registration and **no** other travel involved such as meals, lodging, mileage, etc. then you do not need to fill out a travel request. However, you will still need to provide all of the information in item 1 above in your BPC log.*

NOTE: The registration form that includes the cost of the conference, along with the required information in item 1 above, and a confirmation of payment from the vendor (e-mail or internet is acceptable) to serve as your receipt document will need to be submitted with your BPC statement and log. Please include your travel ID number and your BPC transaction number on your documentation.

International Conference Registrations

You may use the card for international conference registrations in Canada and the UK without any special prior approval. Conference registrations in any other international country **MUST** have prior approval before using the BPC card.

To receive prior approval for international conferences that are NOT in Canada or the UK please follow the steps below.

1. Provide the following information to Deborah Alspaugh via e-mail (dalspaug@kumc.edu)
 - a. Name of the conference
 - b. Name of the vendor
 - c. Address of vendor
 - d. Total dollar amount to be charged
2. **Wait** until you receive notification from Deborah Alspaugh that your proposed international transaction **has been approved** by Topeka.
3. Once you have received notification from Deborah Alspaugh that your proposed international transaction **has been approved**. Follow the procedure at the top of this page.

Q: How can we use BPC for FedEx charges?

A: Yes – give FedEx your BPC card # and all charges associated with that will charge to your BPC.

Q: Can we use it when we need to charge multiple speedtypes/grant #'s?

A: Yes. Call FedEx to set up tracking on BPC. Give them your card # and they will set up a reference. You can then go onto FedEx's website and put in the speedtype as your reference. Once set up with FedEx, when shipping, write in the speedtype or grant # in the reference area and it will show up on your BPC statement so you can charge to the correct funding.

Q: When ordering with SHI, I cannot charge on the BPC. Are changes occurring? Will changes be made to allow those purchases?

A: The State Dept. of Purchases is re-bidding the software contract and will be giving consideration to allowing BPC transactions/usage in making the award. Some contracts allow BPC use and others do not because there can be fees associated with its use.

Q: Is there an online tutorial for review before taking the Annual Knowledge Validation test?

A: No, but there is the manual.

Q: Can we use the BPC card for Continuing Ed Credits in conjunction with a conference registration?

A: If there is no additional charge for the credits then there is no problem. If there is an additional charge for the credits then another method of payment must be made. It is preferred that the separate payment for the CE credits be made during the registration process. A personal check to reimburse the BPC account could be used, but only as a last resort and with approval from BPC Administrator.

Q: We have purchase limits with BPC. Can our BPC limits be increased to allow for the increased usage desired?

A: Yes. There is no set ceiling for monthly transaction totals. We can have your monthly limit increased with the approval of your department head. The maximum transaction limit is \$5,000.00; however, if you have a contract purchase over that amount, contact BPC Administrator or Coordination for special approval.

Q: It's difficult to balance our AM90/91 with BPC use. Is there any way to improve that?

A: All transactions should be entered into the system within 3 business days. That will help keep it more current. The sooner the charges are entered, the more correct the balances will be. BPC transactions appear on the AM90/91 after the transaction has been approved by Purchasing.

Q: Can we get the new copier specifications ahead of time to review?

A: Yes, once the new contract is awarded, an email will be sent and you'll be able to review the contract models, specifications and pricing.

Q: Can we turn in our copiers before the contract expires?

A: Only in special circumstances. Email Peggy Davis for specific situations. Typically, though, the answer is no.

Q: Concerning PAF's, can we save, request, and send them electronically?

A: It depends on what version of Adobe Acrobat you have. If you have Reader, you cannot. If you have Pro, you can save the contents in the document. Pro may become more of a standard in the future.

Q: Can we send Dell quotes electronically?

A: If it's for BPC or Requisitions, you will need to email the appropriate staff person for the answer.

A: Yes. If it is a BPC transaction, send to Deborah Alspaugh and Susan Trolinger. If it's a requisition, send to Steve Scanlon and Janie Meeker.

Q: Is there a cost comparison of processing a BPC transaction versus a purchase order?

A: No. However, there is a fee charged for each check issued for purchase orders. That cost is saved using BPC. A purchase order costs approximately \$100 to process.