



South Carolina

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# Purchasing Highlights

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August 2019

- Purchases under \$5,000
- Purchases over \$10,000
- Requisitions for FY 2019
- Small Purchase Procedure
- Copying Requisitions
- Closing PO's with an Encumbrance Balance
- Blanket PO's for FY19-20
- Purchasing Website
- Upcoming Webinars and Training



It is strongly encouraged to utilize the University purchasing card for all transactions with a total value of \$4,999.99 or less, within compliance. This includes:

- Supplies
- Contractual services
- Memberships
- Fees and dues
- Information technology (computers, toner cartridges, e-devices, and cellular services, cellular and wireless telephones)

*NOTE:* Dell punch-out should be reserved for purchases exceeding the single transaction limit of \$4,999.99.

*Exceptions:* radioactive materials, food/food supplies, gifts (incentives, awards, trophies), promotional supplies

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- It is the responsibility of the vice president, dean, or director to justify the need for an individual under his or her management to have an e-device.
  - Justification should be included, with the expense report, as outlined in University policy, BUSF 7.08.
  - The use of the purchasing card eliminates the need for issuing low-dollar purchase orders, reduces blanket purchase orders and minimizes the use of Payment Requests.
  - Payment by credit card is cost efficient to the University; and most importantly, vendors get paid expeditiously.
  - Be reminded to use state contract providers and spread the wealth by exploring opportunities with local small and minority vendors.



**We are here for you!**

Please reach out to a Purchasing buyer (7-4115) if you need guidance on the best way to procure supplies or services.

An invoice that is greater than \$10k attached to a requisition is a red flag to Purchasing.

- Requisitions for FY2019 will have a status of “complete,” but that doesn’t mean your PO’s are closed.
- Each fiscal year end the PO’s are rolled into the next fiscal year; however, the requisitions do not roll.
- For change orders to PO’s that are rolled, in most cases, a new requisition will need to be created for a change to the existing PO. It is critical to include in the description that the requisition is a “C/O to PO #20000xxxxx” or similar verbiage so that the new requisition line gets copied manually into the proper PO.
- If your requisition is not “complete” or was created in FY2020, the change request functionality is still valid to create a change order for its associated PO.

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- In May 2019 the Procurement Code was updated to allow for 3 bona fide written quotes solicited from a minimum of 3 suppliers for procurements between \$10,000 - \$25,000.
  - You must have issued a written request (e-mail) to each vendor (with the same wording) and receive no fewer than 3 bona fide written responses on the vendor's letterhead. A "no quote" is not a bona fide quote.
  - The solicitation, with any attachments, and written responses, must be submitted by way of attachment to a purchase requisition for Purchasing to evaluate.
  - ❖ Publicly advertised solicitations per the existing Request for Quotations procedures may also be utilized instead, whenever needed or preferred.

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- Remember if you copy a requisition to create a new requisition you need to:
    - ✓ Change the Requester ID if it is someone that is no longer at the University. Use your ID or an appropriate department user if you are ordering on behalf of someone else.
    - ✓ If there is information stored in the Requisition Settings page, remember to clear out the data that does not apply to your new requisition.
    - ✓ Edit the line item description, price, and quantity to match the new quote.
    - ✓ If it's a blanket order requisition include:
      - the authorized requesters
      - the phrase "Cancels & Supersedes PO #20000xxxxx"
    - ✓ Review and Edit the Category Code if a change is needed.



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- ✓ Change the Due Date (expected delivery date *or* effective life of PO blanket line item).
  - ✓ Attach a new quote, if applicable.
    - If there are attachments in the line item or header comments from the old requisition, delete those attachments, save your new requisition, then come back and add any new attachments to the comment areas.
  - ✓ Update the chartfield distribution, if applicable.
  - ❖ Sometimes it's better to start fresh with a new requisition and use an old requisition for information. 😊



**DON'T FORGET TO**

**CLOSE PURCHASE ORDERS**

**Make sure the payment has been processed,  
then send an e-mail requesting to close your**

**Purchase Order to [purchasing@sc.edu](mailto:purchasing@sc.edu)**

- Most Blanket Purchase Orders are valid for one year and are closed out each fiscal year.
- This year we closed Blanket Orders the last week of July providing time for June invoices to process.
- If you have a blanket PO that began in the middle of the fiscal year and was intended to cross over into the next fiscal year, those PO's are rolled with their remaining balances and would be closed out at the end of the effective life of that blanket.



- If you have any additional questions, please email them to [purchasing@sc.edu](mailto:purchasing@sc.edu).
- For all other questions go to the [Contact Us](#) page and email them to the appropriate department.
- This presentation will also be available to download on the PeopleSoft [Purchasing Training Related Resources website](#).

thank you!