

# University Procurement Services Policy Reminder

Key procurement policies, procedures, and best practices related to spend controls.

## General

University Procurement Services (UPS) established [policies](#) and [procedures](#) to manage the purchasing process for goods and services based on requirements for quality, quantity, service, delivery, as well as federal, state, and local laws. Visit the [University Procurement Services website](#) for more information.

## Policy Topic Highlights

### Contracts

1. All contracts are reviewed and executed by UPS unless obtained via the appropriate signatory authority, according to the Office of General Counsel's [Signatory Authority policy](#) (50.3.13).
2. Purchase through appropriate [universitywide contracts](#) to take advantage of negotiated terms and conditions.
3. Existing auto-renewal contracts and contracts without expiration dates will be reviewed with due diligence by UPS.

### Bid Waivers

1. Used for exceptions only, and will be reviewed and approved by UPS according to the policy.
2. Obtaining two or more bids for competitive pricing is strongly recommended.
3. Requisitions that are more than \$10,000 require at least two bids, more than \$150,000 require formal sourcing, and more than \$1,000,000 with bid waiver require approval from the university's Board of Governors.

### Blanket Purchase Orders

1. It is a violation of UPS policy to issue a blanket purchase order (PO) via quick order.
2. A blanket PO should be requested in the current fiscal year and with a sound business reason, but not for the purpose of reducing approval.
3. Requisitioners must monitor funding balances continuously to avoid overspending, causing additional administrative work and invoice payment delay.
4. If a blanket PO is repeatedly overspent, it can lead to the revocation of your requisitioning abilities.

### Punchout Catalog

1. Purchase through the punchout catalogs in RU Marketplace is strongly recommended.
2. Quick Order/Goods requisitions should not be created for punchout catalog suppliers.
3. Items not listed in punchout catalogs can be obtained via a quote from the supplier to submit in punchout orders when applied.

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4. Requisitioners should compare costs in supplier catalogs to identify the best price available.
5. For commonly purchased goods that are not available in punchout catalogs, please contact the [University Procurement Services Help Desk](#).

## Check Requests

1. Refer to the [Non-PO Transaction Matrix](#) for the type of payments processed via check request. Be sure to use password matrix to open the document.
2. Small dollar purchases should be paid via the department-issued purchase card (p-card), resulting in cost effectiveness and rebate. (Refer to the [Non-PO Transaction Matrix](#).)

## Supplier Management

1. Purchase from punchout suppliers, contracted suppliers, and existing suppliers in RU Marketplace before inviting a new supplier.
2. New supplier invitations will be reviewed with additional due diligence before approval to support the overall sourcing strategy.
3. Please consult with the UPS Campus Liaison when purchasing from a new supplier.

## Invoice before Purchase Order

1. It is a violation of UPS policy to create a purchase order after a purchase (i.e., invoice before encumbering). RU Marketplace access privileges will be revoked for repeat offenders.
2. Any invoice submitted before a PO is created will be reviewed by the Chief Procurement Officer and communicated to Audit and Advisory Services for review.
3. POs submitted after the invoice must include a detailed explanation and approval from departmental leaders.

## Travel and Expenses

1. Alternative means of communication should be used before travel is considered.
2. All travel requires pre-approval via the [Travel Exception Approval form](#).
3. If a university credit card was issued for business travel, then you are required to use it for all business travel. If one has not been issued, contact your business office.
4. All international business travel must be registered and reviewed by University Risk Management and Insurance, and the [Travel Exception Approval form](#) must be completed.
5. Travelers must attach the approved [Travel Exception Approval form](#) to all expense management reports submitted for reimbursement.