Introduction & Overview

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All initial requests for goods, services, and supplies must include SLBS Request Form prior to processing in Workday. This form, along with a brief explanation/justification is also required for an invoice without a valid PO in place.
Note: these are estimates, the more complete and accurate information we receive at the onset, the faster we can turn these processes around.

- RX-Purchase Requests – 30 days
- Journal Voucher – 5-10 days (Formerly IDR)
- Invoices – PO – 7-14 days for SLBS processing (check runs are on the last Wednesday of each month) however, AP processes payment net 30 from date of invoice or service, which ever is later
- Invoices – without PO – up to 30 days (after the fact purchase requires written justification)
- ICA – 30 days (Independent contractor agreement – formerly ISP)
- Contracts – 60 days
SLBS Request form will be returned to the requestor if the following information is not complete:

- Requestor’s Information/Submitted date
- Vendor’s name – are they a registered supplier?
- If not, the link or URL should be sent to them to get that process started: https://suppliers.nevada.edu
- Event date or date request is needed
- Description of purchase and quote or ITQ
- Cost and program to be charged
- An approved signature by Authorized person

Completed form can be given to your Account Manager or emailed to slbusiness@unlv.edu
UNLV Purchasing Guidelines

- **Open Purchase Order**
  - Refers to the ongoing purchase of items at times of necessity through the FY

- **One Time Purchase Order**
  - Refers to a purchase of a specific item/service for a specific price

- **Goods**
  - Refers to purchasing tangible items such as computers or signage where what is ordered is exactly what will be received and the price will not change

- **Service**
  - Refers to the purchase of items or service where the quantity, frequency and or pricing is not known ahead of time or changes depending on the item

- **ITQ**
  - Is required for any purchase, no matter the amount, if a vendor is required to come on campus to perform some action that requires a contractor’s license, such as installing signage
For Purchases less than $5,000:

- The P-card is the preferred method of making purchases of goods $5,000 or less. The P-Card can be used for Limited services of $5,000 or less (P-Card office pre approval needed) that do not require a written agreement, terms and/or conditions to be signed. This will be covered more in depth in the P-card training.

- **When in doubt, Please contact your account manager!**
Commodity and Service Purchases

- Commodity & Service purchases under $25,000
  - Quote on the vendor/supplier letterhead, a quote number or reference, the date of the quote, the expiration date for the quote, a brief description of the service or merchandise and the final cost

- Commodity & Service purchases between $25,000 - $50,000 and $50,000+
  - Minimum of 2 written quotes for purchases between $25-$50K
  - Over $50K, these must be competitively bid by Purchasing
Personal, Professional, and Consulting Services

- Less than $25K requires 1 informal proposal
- $25-$50K requires 2 competitive informal proposals
- $50-$75K requires 3 competitive informal proposals
- Over $75K requires a formal solicitation process by purchasing
Services With Signed Contract or Agreement

- Any service requiring the signing of a contract or agreement by the University must be processed in Workday by submitting a purchase requisition. Purchasing will determine proper procedures for processing the request which may include informal and/or formal solicitations.
Informal Solicitations Vs. Formal Solicitations

- “Competitive” Informal Solicitations
  - Are written solicitations received based on a request for solicitation containing a scope of work presented to the parties providing the solicitation

- Formal requests for solicitations
  - Require a more detailed process which includes advertising in a public newspaper and sealed responses that are publicly opened and recorded. When soliciting Architects and Engineers, the requests will take into consideration any other applicable state requirements for such services when requesting solicitations. This type of request must go through Purchasing.
Qualification of bidders

Anyone submitting bids on State of Nevada Public Works projects must be first qualified as a bidder. Each bidder shall be properly licensed by the Nevada State Contractors Board prior to the bid opening. The owner will not award a contract to any bidder who, at the time of the bid, is not licensed under the provisions of Nevada Revised Statues Chapter 624, or if the contract would exceed the limit of his or her license.

Detailed information regarding qualified bidder applications and list of qualified bidders can be found here: https://publicworks.nv.gov/Bids/Qualification_of_Bidders/

Vendors must be on the list to be awarded a Purchase order to perform work.
Less than $25K requires an ITW from 1 vendor/supplier

Between $25K-$100K requires a sealed ITQ from 3 vendors/suppliers (seal to be opened by requisition requestor)

Over $100K will be managed through the formal RFP process by purchasing

There are no preferred vendors for construction projects, but must be on the qualified bidders list

When 3 quotes are required, all 3 must be included with the requisition

Also the vendor/supplier sign-in sheet must be provided to purchasing when submitting the requisition
Please use the latest ITQ form. It is the only one Purchasing will accept going forward; it will be available on the SLBS website or from your account manager.
Construction Projects (Part 4)

- Delivery vs. Installation
  - These are not the same thing. For example: A vendor delivers a refrigerator to the dock, that is considered delivery.
  - The same vendor delivers a refrigerator to the Break room of the SU and plugs it in, that is considered installation.

- Contractor’s license
  - Sometimes a contractor’s license is required for a vendor to perform a task.
  - An ITQ is needed for any service or work that requires a Contractor’s license (ex. Paint, flooring, etc.)
  - Example: installation of a filtered water unit where the equipment needs to be hooked up to a water source.
Please remember that once a requisition is entered in Workday, a budget check will be done and those funds will be “Committed” and then “Obligated” or encumbered when the PO is complete.

In most instances, modifications can be made to the original PO.

A SLBS request form indicating the change desired and justification should be submitted to your Account Manager. In many cases, your Account Manager will be the initiator of a PO modification letting you know an increase or change is needed.
Invoicing/Paying for Goods or Services

- When an invoice is received and the item or service is complete, you can submit the invoice to your account manager with an approval or ok to pay from a signature authority.
- The SLBS form is not required to accompany an invoice for payment if there is a valid PO in place for that purchase.
- Account Managers will prepare the invoice for entry into Workday and begin the process to pay.
- Often, you will receive the invoice from your Account Manager, the approval process is the same.
- Sometimes an invoice is incorrect and needs to be revised, please contact the vendor and request a corrected invoice.
Vendors should be instructed to use the UNLV FedEx account when shipping items. This is a convenient method for the vendor due to the fact the shipping charges are charged to the University and then billed back to each area.

This is convenient when creating a PO, as the shipping/delivery is not included on the quote and will not be added to an invoice later (many times this is not a fixed amount and can change the total amount of the PO).

However, the vendor should add a note to any quote stating that UNLV FedEx account is to be used for shipping.

Bids submitted with alternate shipping terms may be delayed or questioned.
Helpful Resources

- Purchasing Manual:
  - Please refer to the manual as needed:
    - https://www.unlv.edu/purchasing/policies
You have now completed this training:

For any further questions please contact your Account Manager with Student Life Business Services!

Have a great day!