



UNLV | STUDENT LIFE
Student Life Business Services

Purchasing Training

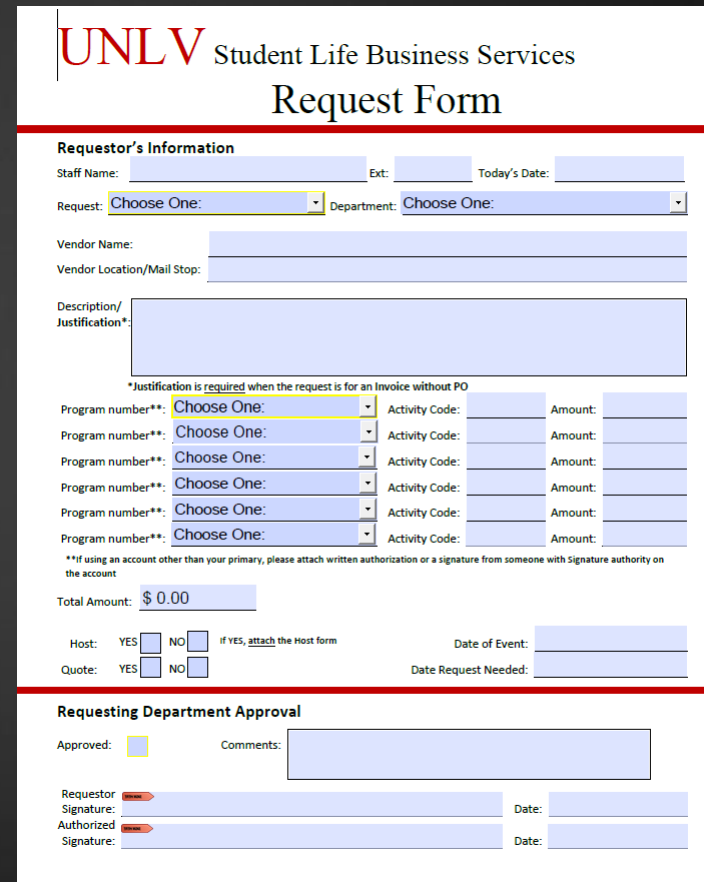
REFRESHER & LATEST UPDATES

Introduction & Overview

- ▶ What is in this PowerPoint:
 - ▶ Purchase Request Form
 - ▶ UNLV Purchasing Guidelines
 - ▶ Commodity and Service Purchases
 - ▶ Personal, Professional, and Consulting Services
 - ▶ Services with Signed Contract
 - ▶ Informal Solicitations Vs. Formal Solicitations
 - ▶ Construction Projects
 - ▶ Invoicing/Paying for goods or services
 - ▶ Shipping and Delivery
 - ▶ Helpful Resources

Purchase Request Form

- ▶ 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



UNLV Student Life Business Services Request Form

Requestor's Information

Staff Name: _____ Ext: _____ Today's Date: _____

Request: **Choose One:** _____ Department: **Choose One:** _____

Vendor Name: _____

Vendor Location/Mail Stop: _____

Description/Justification*: _____

*Justification is required when the request is for an Invoice without PO

Program number**:	Choose One:	Activity Code:	Amount:
Program number**:	Choose One:	Activity Code:	Amount:
Program number**:	Choose One:	Activity Code:	Amount:
Program number**:	Choose One:	Activity Code:	Amount:
Program number**:	Choose One:	Activity Code:	Amount:
Program number**:	Choose One:	Activity Code:	Amount:

**If using an account other than your primary, please attach written authorization or a signature from someone with Signature authority on the account

Total Amount: \$ 0.00

Host: YES NO if YES, attach the Host form Date of Event: _____

Quote: YES NO Date Request Needed: _____

Requesting Department Approval

Approved: Comments: _____

Requestor Signature: _____ Date: _____

Authorized Signature: _____ Date: _____

Purchase Request Form (Part 2)

- ▶ 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
- ▶ **Note: these are estimates, the more complete and accurate information we receive at the onset, the faster we can turn these processes around**

Purchase Request Form (Part 3)

- ▶ SLBS Request form will be returned to the requestor if the follow information is not complete:
 - ▶ Requestor's Information/Submitted date
 - ▶ Vendor's name – are the 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

UNLV Purchasing Guidelines (Part 2)

- ▶ 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.

Construction Projects


- ▶ 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 Statutes 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

Construction Projects (Part 2)


- ▶ 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

Construction Projects (Part 3)

- ▶ 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

 **UNLV**
UNIVERSITY OF NEVADA, LAS VEGAS

**NEVADA SYSTEM OF
HIGHER EDUCATION
BUSINESS CENTER SOUTH**


**NEVADA STATE
COLLEGE**

Invitation To Quote

For Projects for which cost is less than \$100,000.00

Issue Date: Insert Date
Project Name: Insert Name
Project Manager: Insert Name
Owner: Board of Regents of the Nevada System of Higher Education, on behalf of Choose an item.
 A SITE VISIT will be held on Click or tap to enter a date. (Date) at Insert Time PST (Time), at Click Insert Location. Failure to attend site visit may result in the disqualification of Contractor's Quote.
 Electronic viewing of the site will be available on Click or tap to enter a date. (Date) at Insert Time PST (Time) via Insert Method and Access Instructions..

Requests for information (RFI's) must be submitted in writing on or before Click or tap to enter a date. (Date) at Insert Time to Insert Email Address.

The Project must be completed by the Completion Date which shall be as specified in (1) or (2):

(1) Within Insert # of Days calendar days of issuance of Purchase Order by UNLV
OR
 (2) No later than Click or tap to enter a date. (Date)

QUOTES for this Invitation must not exceed \$25,000.00.
 QUOTES for this Invitation must not exceed \$100,000.00.

QUOTES **MUST** be returned no later than Insert Time PST (Time) on Click or tap to enter a date. (Date) by email, in PDF format, to Insert Email Address. The subject line of the email should be labeled with the Project Name and Opening Date. The body of the email should NOT contain any pricing information or other substantive information relating to the Quote.

The official award of the Contract will be made by issuance of a Purchase Order.

SCOPE OF WORK

Those submitting Quotes to perform the work on this Project agree to provide all labor, tools, supplies, equipment, full time on-site supervision and transportation necessary to accomplish the Scope of Work as indicated below, in accordance with Nev. Rev. Stat. 338, the Additional Terms, Summary of Work, any attached Special Conditions unique to this Invitation to Quote, other construction documents contained in this Invitation to Quote, and the Purchase Order (the "Contract").

If applicable, included construction documents are from Insert Name of Company (Architect/ Consultant name), Pages Insert Starting Page Number through Insert Starting Page Number.

Scope of Work to be completed by Completion date:
Insert Scope.

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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

Construction Projects (Part 5)

- ▶ 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

Shipping and Delivery

- ▶ 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>

Training Complete

- ▶ You have now completed this training:
- ▶ For any further questions please contact your Account Manager with Student Life Business Services!
- ▶ Have a great day!

