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University at Buffalo Procurement Services Purchase Guidelines...

Purchasing Guidelines

- The preferred method of purchasing work-related expenses, supplies, and equipment appropriate to the account, and Procurement Card Guidelines for orders under \$2,500, is the Procurement Card. For State monies it is the Citibank Visa, for Research it is the Amex Card.
- Speed Orders-the Speed Order process may be used by authorized users for State purchases up to \$1,500 when no other Purchasing method is available.
- **All** other purchases are to be processed through the Purchasing Department eReq system.
- Items available on New York State Contracts do not require additional competition.
- "Sole source or single source" purchases require documentation and written justification from an authorized person giving specific reasons for the "sole or single source" nature of the required items for purchases in excess of \$5,000 for State and \$10,000 for Research. Reasonableness of price must be documented over \$5,000.

Requirement Guidelines

Dollar Amount	Method	Requirements
The preferred method of purchasing supplies and equipment under \$2,500 is the Procurement Card		
\$0 – \$1,500	Speed Orders	Price must be reasonable, see bullet above.
\$0 – \$2,500	Procurement Charge Card	The preferred method of purchasing supplies and equipment under \$2,500. Must be appropriate to grant or account. Department to ensure reasonableness of price. No bids required. Timeframe – immediate.
\$0 – \$5,000	eReq	Process eReq to Purchasing. All orders over \$2,500 should be placed through Purchasing. Price must be reasonable. If the department has obtained quotes, please send over w/eReq. No competition required. No formal bidding required. Allow 2-3 working days.
\$5,000 – \$50,000	eReq	2-3 competitive quotations or "sole source" justification (\$10,000 for Research). Price reasonableness must exist as determined through bids, price lists, state contract, catalog comparisons, etc. Must state why price is reasonable. Purchasing will obtain quotations if necessary. Allow 5-15 working days.
State – Over \$15,000	eReq	Lobbying Laws 139J, K and/or Consulting G-226.

Research – \$50,000 and up	eReq	<p>A minimum of 3 formal quotations required.</p> <p>If "sole or single source," justification in the form of a letter on departmental letterhead, stating why the item is only available from this source, is required. Price reasonableness required.</p> <p>Allow 3-10 working days.</p>
State – \$50,000 – \$125,000	eReq	<p>Advertise in Contract Reporter (CR), or waiver of CR, or announcement in CR.</p> <p>Formal bid or "sole or single source" with price justification. Purchasing will scan successful bid with pertinent documents with eReq.</p> <p>Allow 5-7 weeks for processing (CR ad, bid analysis, etc.).</p> <p>Note: all bidding should go through Purchasing.</p> <p>Over \$100,000 needs ST-220 and Vendor Responsibility forms.</p>
State – \$125,000 – \$250,000	eReq	<p>Advertise in Contract Reporter (CR) or waiver of CR.</p> <p>5 sealed bids or sole source with price justification required. Purchasing will obtain pricing backup.</p> <p>If "sole or single source," bid protest, or not low bid, prior approval from the Office of the State Comptroller is required. Allow 10-12 weeks to process.</p> <p>Otherwise 5-7 weeks.</p>
State – Over \$250,000	eReq	<p>Advertise in Contract Reporter (CR) or waiver of CR.</p> <p>5 sealed bids or sole source with price justification.</p> <p>Prior approval of Attorney General and Office of the State Comptroller (Service Contracts only)</p> <p>Allow 10-12 weeks to process.</p>

Note: Items available on NYS Contracts, do not require additional competition.

1. Minority and women owned businesses

The University encourages the placement of orders to minority and women owned businesses (MWBE).

2. Blanket/standing orders

Blanket/standing orders can be set up with vendors to cover a series of small purchases over a prescribed period.

- A. Blanket Orders cover a number of miscellaneous items to be ordered as requested.
- B. Standing Orders usually cover multiple purchases of the same item that may be shipped at a pre-determined time.

The requisition must specify the vendor, the general or specific type of supply (chemicals, biological solutions, disposable lab supplies, etc.), the period of time to be covered, and the estimated amount of money to be encumbered.

Must end, on or before, the grant ending date or end of fiscal year.

3. Equipment Insurance – Research

Upon request, the Research Foundation offers insurance coverage for equipment purchased for and/or with sponsored program funds. The yearly premium rate is 1% of the value of the item and is usually an allowable charge against the grant.

This insurance covers loss from theft, fire, vandalism, explosion, etc. and carries a \$100 deductible for each claim. Please note that your equipment is not automatically insured; you must specifically request such coverage.

4. Emergency Purchases

EReqs requiring emergency action should be indicated on the eReq. Follow up with a phone call to the buyer. If an item is needed by a certain date, please indicate the **actual date** in the “Requested Delivery” area. Failure to successfully communicate your needs could result in unnecessary delays.

5. Receipt of Goods or Services

Upon receipt of goods, the order should be checked to verify that all items listed on the packing slip have been shipped and that all items have been received in good condition. If items are missing or damaged, immediately contact the appropriate Purchasing contact for further directions and resolution of the problem. Use Automatic Receiving Policy for receipts up to \$1,500. Department must maintain record of receipt. State use web receiving; Research send in receiver (automatic receiving in development for Research)

6. How to Purchase Used Equipment

Requests for the purchase of used equipment, in the majority of cases, are “sole source” and competition cannot be obtained. Please include the following information with your eReq:

- If the used equipment was physically inspected and observed while in use, so state. If not, a statement as to how you, the user, became aware of the equipment and how the equipment’s condition is being evaluated sight unseen.
- Best estimate of the equipment’s condition.
- How the equipment is to be used and its benefits to the user.
- That the used equipment meets all the user’s needs and will do the job as well as a new piece of equipment.

Also, the written quotation from the vendor must include the following and must be submitted with the eReq and “sole source” letter:

- Model and serial number of equipment being offered.
- Age and original selling price of equipment.
- Current used selling price.
- Statement of condition.
- Details of any guarantee and/or warranty on used equipment.

7. Sole Source Purchases over \$5,000 (State); \$10,000 (Research)

In those cases where the purchase is limited to a single manufacturer, a written justification/explanation must be attached to the eReq. This document must indicate why the requested item(s) are unique and only available from this source. Reasonableness of price must be documented.

8. New York State Sales Tax Exemption

Purchases made by and for the University are exempt from New York State sales and use tax.









A New York State Sales Tax Exemption form is to be used whenever you make out-of-pocket petty cash purchases or for emergency expenditures made when a purchase order is not acceptable to a vendor or cannot be provided in a timely

fashion. All information requested on the form must be completed before it is presented to the vendor. Forms online are available on the UB Business website, under FORMS.

9. Reimbursement

Requests for reimbursement of personal expenditures exceeding the petty cash limit (\$250) are processed using the RAP (reimbursement/Advance Payment) form. Cash payment requires the original receipt. Charge payment requires the original receipt and a copy of the bank statement. You may black out any other purchases. If no receipt available, will need original bank statement. You may black out any other purchases. Reimbursement will cover the costs of **purchased items only**. Any taxes charged to the sale may not be reimbursed.

Project Directors should be aware that they are personally liable for all petty cash purchases which are not allowable under the sponsor of RF regulations.

Facilities (<http://www.buffalo.edu/facilities.html>) | SPS (<http://www.research.buffalo.edu/sps/>) | UBF (<http://www.ubfoundation.buffalo.edu/>) | Business Services (/ubb/cfm/ubs_pages/home_pages/displayhome.cfm) | USS-IT Citrix Apps (<http://uss-citrix.uss.buffalo.edu/Citrix/AccessPlatform/auth/login.aspx>)  (</ubb/cfm/calendar/>)  (</ubb/cfm/forms/>)  (</ubb/cfm/policies/>)  (</ubb/cfm/glossary/>)  (/ubb/cfm/ubs_pages/email/email.cfm?script=/ubb/cfm/ubs_pages/displayPage.cfm&title=UBS Web Page)  (/ubb/cfm/ubs_pages/print/printPage.cfm?page_id=10299)  (https://ubbusiness.buffalo.edu/ubb/cfm/ubs_pages/systems/getSystems.cfm)  (/ubb/cfm/ubs_pages/sitemap/index.cfm)



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