Established 1909

OPSU POLICIES AND PROCEDURES

TITLE: Purchasing

APPROVED BY: Benny Dain, VPFA

ISSUING SOURCE: Elizabeth McMurphy, Director of Purchasing

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**********Bidding Requirements**********

Purchases *ranging from $5,000.01 to $10,000* will require bidding and/or quotes. These will be done by the Department requesting the purchase or Director of Purchasing at OPSU. Contact three vendors for quotes. Complete a requisition as described above for the vendor with the lowest bid that met the specifications. Although this will require additional time, it will save OPSU money by making vendors compete for our business. This includes products as well as any services you need. Planning is key to making this process work effectively! You cannot submit multiple requisitions to the same vendor to get around the bidding process; this is called Split purchasing and is strictly prohibited!

Purchases *ranging from $10,000.01 to $25,000* will require formal bidding to be conducted by OPSU Director of Purchasing who will request bids and complete this process for OPSU. If you have specifications for the purchase or suggested vendors to be contacted for bids, please include this information on your requisition including a phone number, fax number, and email.

Purchases *ranging from $25,000.01 and above* will require formal bidding to be conducted by OSU who will request bids and complete this process for OPSU. If you have specifications for the purchase or suggested vendors to be contacted for bids, please include this information on your requisition including a phone number, fax number, and email to the vendor "subject to bid".

**********Purchasing Process and Procedures**********

The steps listed below must be done before anything can be ordered:

1) Completely fill out a requisition- This can be done online using OK Corral, unless you are using a club account (begins with a 9). Clubs and organizations must use a paper requisition

and include the sponsor's signature and one officer's signature. Paper requisitions are available in the Business Office.

2) Check first to make sure the vendor is in OK Corral by doing a supplier search. If they are not in OK Corral, check with OPSU Purchasing to do a search in SCT. Sometimes vendors have to be moved over to OK Corral if they have not been used in it before. If this is a new vendor, request a W9, addresses, phone and fax numbers, and email address.
3) It is very important to put your department account number on the requisition.
4) The items or services you are requesting must be included in detail on the requisition. Simply writing "see attached quote", is not appropriate. We have to know the quantity, catalog number, and description of exactly what you are requesting. Be sure to include the unit price and total price. Do not forget to include the shipping or freight charges.
5) When applicable bidding requirements have been met and after the above steps have been completed, the requisition will go through the proper approval process before it will be created into a purchase order. Please keep in mind you must have adequate budget in your account or your requisition will be returned back to you. If you have questions regarding your budget, please contact the Director of Purchasing.
6) Once the purchase order is completed, you can place your order. Do not place the order before receiving the Purchase Order! You could be liable for the purchase if these procedures are not followed. <u>The Director of Purchasing will not place the order; the requestor places the order once the purchase order is received. If a PO distribution fax or email is included in the vendor's information, the purchase order will be distributed to the vendor upon completion.</u>

**********Unencumbered Purchases**********

The following are purchases that do not require a requisition.

a) Debt service payments from the OPSU Bursar Office.
b) Bookstore purchases under $5,000.

**********Payment of invoices **********

After you have received your products and/or services, you should receive an invoice to pay the vendor. When submitting your vendor invoices to Accounts Payable, please be sure to:

A) Write "okay to pay" on the invoice, date it, and sign your name as having received the merchandise/services. Reference a purchase order number if it is not already on the invoice.
B) After everything is attached, turn in to Accounts Payable for payment.

**********OPSU Purchasing Card Policy & Procedures**********

The Oklahoma Panhandle State University purchasing card (p/card) program establishes the use, by designated University employees, of commercial purchase cards to facilitate

the acquisition of lower dollar goods and services needed for conducting official University business. It is intended that the p/card be issued to selected University employees to enhance departmental effectiveness or economy of operation. P/cards are issued in the name of Oklahoma Panhandle State University and include the cardholder's name, department, and a unique account number. Liability for payment and total responsibility and accountability for the p/card resides at the departmental level.

If you are issued a purchasing card, you will receive the full Purchasing Policy and Procedures packet.

**********Reissuing lost or stolen checks**********

Students and vendors are responsible for checks received from OPSU. A $15 fee will be charged for reissuance of any lost or stolen checks.