Welcome

February 20th, 2013
Purchasing Information Session
WHO WE ARE.....

Lisa Campagna
Purchasing Manager

Michele Khasidis
Purchasing Administrator

Deborah Pettito
Clerk – part time
ESF PURCHASING

MISSION

To purchase quality goods and services economically and efficiently and in compliance with SUNY and New York State procurement regulations.
What we do....

- Procurement for SUNY-ESF Research Foundation
- Procurement for SUNY-ESF NYS appropriations
- Fuel Card distribution & Reconciliation
- Contracts management for Commodities and Services
- IFB & RFP Development & Support
- On-line vendor setup and support (Staples, Grainger)
.....WHAT WE DO CONTINUED

- *MWBE compliance for Commodities and Services*
- *Vendor Inquiries & Negotiations*
- *Compliance Requirements and Reporting*
- *Liaison between ESF and System Admin, Legal, Vendors, Other Partners*
- *Assist with other Business Office functions*
WHAT WE DON’T DO...

- Pay invoices - Accounts Payable
- Personal Reimbursements – handled through Cashier or Accounts Payable – new form being developed by Business Office to include justification
- Travel – Travel office
WHAT’S NEW?

- SFS – NYS Financial System
  - Substitute W9 Forms
  - IRS match
- Increased Discretionary threshold
  - $125k, $250K OSC approval
- MWBE goals increased
  - 20% 2012-13, 28% 2016
  - Increased from .02% in 2008 FY to 32% in 2012 FY.
  - RF now has MWBE requirements
- BJ’s & Home Depot Accounts available
- Purchase Requisitions-Revised
  - Shipping language
- Apparel purchases
  - Compliance
- Carbon copy purchase orders changed to electronic distribution
- Purchase Orders emailed & faxed to vendors
- Purchasing Web Page
ESF PURCHASING HOME PAGE

http://www.esf.edu/business/purchasing/
Requisitions 101
A guide in how to Complete

By Michele Khasidis
Research Foundation Requisitions

How to complete & Navigate
The new RF Requisition

The Research Foundation of State University of New York
Purchase Requisition

<table>
<thead>
<tr>
<th>Supplier / Payee:</th>
<th>Ship to Address (If Other Than EST Central Receiving)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Sec. # or F Vendor IDE</td>
<td>Address:</td>
</tr>
<tr>
<td>Address:</td>
<td>City: State: Zip Code:</td>
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<tr>
<td>Phone #:</td>
<td>Fax #:</td>
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</tbody>
</table>

Please Note: Requisitions Must Be Legible and Complete. Remember to Allow Ample Processing Time

***ATTACH ALL QUOTES SOLICITED***

<table>
<thead>
<tr>
<th>AWARD</th>
<th>TASK</th>
<th>PROJECT</th>
<th>Requisitioned By:</th>
<th>Approved By—Please Print:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty or Department</td>
<td>Room #:</td>
<td>Building Location:</td>
<td>Authorized Signature: Date:</td>
<td></td>
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<tr>
<td>550 -</td>
<td>Telephone #:</td>
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<table>
<thead>
<tr>
<th>Item Category</th>
<th>Catalog Number &amp; Complete Description</th>
<th>Quantity</th>
<th>Unit</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor Major</td>
<td>(If Hazardous item, Please Indicate Type From List On Back)</td>
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</tbody>
</table>

Shipping charges may not be paid without the prior approval of signatory. Please include shipping charges here.

Fax Order [ ] Do NOT Fax [ ] By Purchasing Office Dept. will place order with Purchase order #.

Invoice Attached [ ] Total [ ]
The Research Foundation of State University of New York
Purchase Requisition

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<th>Ship to address ONLY if not at Central Receiving in Syracuse</th>
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<td>AWARD</td>
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- **Grant Information**
  - Award= 5 digits
  - Task= 1-4 digits
  - Project= 7 digits
  - Department- Example: EFB

- **Requisitioned By**
  - Who will receive goods/service
  - Will receive PO via email
  - Include delivery location

- **Approved By**
  - Print Name
  - Authorized Signature on PTA
  - Include Date Signed
**Item Category** - ORP or Purchasing will complete

**Catalog # & Description**
Include catalog # and complete item description

**Price/QTY**
Include price per unit and final total for each line item. **Total equals the QTY times Unit Price.**

**Freight**

- **FOB Destination- “Free on Board”**
  FOB Destination, The seller owns the goods while they are in transit. Title passes at the buyer's location.

- Include actual freight cost if known. Otherwise include an estimate freight cost.

**TOTAL**
Final total of all items listed plus any freight charges.

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<th>Item Category</th>
<th>Catalog Number &amp; Complete Description (If Hazardous item, Please Indicate Type From List On Back)</th>
<th>Quantity</th>
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<tr>
<td>Minor</td>
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- Fax Order
- Do NOT Fax
- By Purchasing Office
- Dept. will place order with Purchase order #.
- Invoice Attached
- Total

This area lets purchasing know if the item needs to be placed and how.
A complete RF request

The Research Foundation of State University of New York
Purchase Requisition

To be completed by Business Office
ORP approval: ________
Rec'd Date: __________
P.O. #: __________

Supplier / Payee: Schoolyard Sugarbush
Social Sec. # or Vendor ID#: 247436880
Address: 5967 Appletree Point Road
City: Moravia State: NY Zip Code: 13118
Phone #: 315-497-3480 Fax #: ________

Note: Requisitions Must Be Legible and Completed Remember to Allow Ample Processing Time

AWARD 61958 TASK 1 PROJECT 1164815
Requisitioned By: Robert S. Davis
Approved By—Please Print: Robert S. Davis
Authorized Signature: _____________________________
Date: 1/4/2013

<table>
<thead>
<tr>
<th>Item Category</th>
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<th>Quantity</th>
<th>Unit</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor Major</td>
<td>Go over old section reworking tubing and adding new taps repairing damage</td>
<td>24.00</td>
<td>EA</td>
<td>$35.00</td>
<td>$840.00</td>
</tr>
<tr>
<td></td>
<td>Bore and tap existing releaser</td>
<td>2.00</td>
<td>EA</td>
<td>$35.00</td>
<td>$70.00</td>
</tr>
<tr>
<td></td>
<td>Make connections from wood into sap house</td>
<td>5.00</td>
<td>EA</td>
<td>$35.00</td>
<td>$175.00</td>
</tr>
<tr>
<td></td>
<td>Add top main line and rework in old section</td>
<td>5.00</td>
<td>EA</td>
<td>$35.00</td>
<td>$175.00</td>
</tr>
<tr>
<td></td>
<td>Please provide actual or prepay &amp; add Shipping &amp; Handling Costs:</td>
<td>1.00</td>
<td>Freight</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

Order □ Do NOT □ Fax Dept. will place order with Purchase order #.
Invoice Attached □

Total $1,260.00

RECEIVED
JAN 28 2013
PURCHASING DEPT

This area is very important, it lets purchasing know if this order needs faxing if dept will fax or if invoiced. Left blank can delay order.

Vendor Information filled out.
Account info filled out. Dept. filled out.
Request signed and date included.
Items with complete description and pricing qty/price/amt correct.
Date stamped- the clay mail is received or placed in purchasing inbox.
Questions on RF Requisitions?
State Requistions

How to complete & Navigate
# The new State Requisition

## STATE PURCHASE REQUEST

**SUNY COLLEGE OF ENVIRONMENTAL SCIENCE & FORESTRY**

**Revised 1/13**

### Supplier / Payee:

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### Notes for Requisitioner:

- Orders over $2500, visit the purchasing website for required documentation submitted with request.
- Attach documentation of any quotes received by minority/women-owned businesses.

### Requisitioned By:

<table>
<thead>
<tr>
<th>Room #:</th>
<th>Bldg:</th>
<th>Phone #:</th>
</tr>
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</table>

### Approved By—Please Print:

<table>
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<th>Authorized Signature:</th>
<th>Date:</th>
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### Account # to be charged

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### Purchasing to

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<tr>
<th>Fax Order</th>
<th>Do NOT Fax</th>
<th>Minority Vendor solicited</th>
<th>Women Vendor solicited</th>
<th>Invoice Attached</th>
<th>Total</th>
</tr>
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<tbody>
<tr>
<td>Dept. will place order with Purchase order #.</td>
<td></td>
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**Header Information**

- **Supplier/Payee**
- **Soc Sec/Vend Id**
- **Address** - Include City / State / Zip code
- **Phone/Fax** - Important to include for contacting/placing orders
- **Ship to address** ONLY if not ESF Central Receiving
- **Requisition#** - From ESF Website
- **NYS Contract#** - Fill in if applicable

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<table>
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Notes for Requisitioner:
Orders over $2500, visit the purchasing website for required documentation submitted with request.
Attach documentation of any quotes received by Minority/Women owned businesses.

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Attach all quotes verbal or non-verbal.

Please refer to the purchasing website:
State funded Purchasing-Procurement Thresholds

Be sure to include all of the following:
- Requisitioned by
- Room#
- Bldg
- Phone
- Approved by Print name
- Include Signature and date signed
This area lets purchasing know if the item needs to be placed and how.

*Attach documentation of any solicitation.*

**Account# to Charge** - Enter your state account #s

**Catalog #/Description** - full item description and catalog #. Please include end-user email if ordering licenses.

**Price/QTY** - Include price per unit and final

**Freight**

- **FOB Destination** - “Free on Board”
  
  *FOB Destination,* The seller owns the goods while they are in transit. Title passes at the buyer's location.

  Include actual freight cost if known. Otherwise include an estimate freight cost.
A complete State Request

Complete vendor information filled in. Fax/ph # included
Delivery and requestor's information
Include requisition#
Include shipping cost estimate
Purchasing to fax in order. Box is marked.
Included additional quotes.
Questions on State Requisitions?
Potential Delays for State or RF Orders
What are potential delays?

- Vendor not on File
- Incomplete Requisition
- Mailed to wrong department
- System constraints
- Budgeting
- Approvals- RF Orders
- Additional form requirements
- Additional quotes/justifications
## RF & State Requisition Summary

- Complete requisition
- Writing is legible
- Include all quotes - verbal or non-verbal
- Include shipping charges actual or estimate
- Rush items - include delivery option - ex. Next day/ 2\textsuperscript{nd} day/ ground/ etc
- Allow processing time - Department request → purchasing review/process → vendor review/process → item received.
- Include any specific dates
REMINDERS…..

- We are all stewards of the state and accountable for the taxpayer dollars we spend. Compliance is extremely important. If you are not sure, please ask us.

- OSC has identified the PCard as an efficient use of NYS resources. Please use it when the opportunities arise.

- State Employee Owned Companies – recent audit

  BulletingPublic Officer’s Law dated February 25, 2002 reminds all State agencies that no State employees shall sell any goods or services having a value in excess of twenty-five dollars ($25.00) to any State agency unless goods and services are provided pursuant to an award or contract let after public notice in the New York State Contract Reporter and a formal, competitive bidding process. Therefore, please be advised the College will not do any business with any State employee owned business without a formal bid process being followed.
MORE TO COME!

- PCard for Research Foundation
- On-line purchase requisitions for NYS Procurement
- More on-line vendor web links (Krackler, Grainger, etc)
- Regular Purchasing Information sessions
- Research Foundation resources webpage
Thank you For coming to our Presentation!

Please be sure to grab a TIP SHEET