Purchasing Office

Policy & Procedure Manual
A. **GENERAL INFORMATION**

1. The purchasing policies and procedures shown herein are required by the State of Wisconsin Department of Administration, and the University of Wisconsin System. We will do all we can to purchase what you need in a timely manner following these guidelines.

2. All monies, whether from student activity fees, lab fees, private gifts or grants, federal and state grants, workshops, clinics, etc., are considered State funds and all purchasing regulations apply.

3. No purchase orders will be issued prior to receipt of a requisition by Purchasing. In case of an emergency, authorization may be obtained by calling the Purchasing Office at 342-1221.

4. UW-Platteville must aggressively target small, minority, and veteran businesses in its low dollar purchases.

B. **DIRECT PAYMENTS**

A completed purchase requisition should be submitted to the Purchasing Office, along with the renewal notice or order form, for all subscriptions, memberships, registrations, or purchases for supplies and equipment under $5,000. The requisition will then be paid via check without putting a Purchase Order in place.

C. **PRINTING**

State of Wisconsin Statutes, Chapter 35, establishes competitive bidding as the required method of purchasing printing. All printing done off-campus **must** be processed through the UW-Platteville Publications Office. You may be personally responsible for the cost of any printing you have done without going through the Publications Office. It is suggested you allow at least three weeks to complete the printing process. Contact the Publications Office at 342-1197 if you have any questions.

D. **PURCHASE ORDER PROCESSING**

1. **REQUISITIONS**
   a. All orders will be submitted via the online purchase requisition form. Be sure to fill out and attach the line item file that provides a description of the purchase. Also attach any required information i.e. quotes, invoices, bid documentation etc.

      Call the Purchasing Office if you need help with the online form.

   b. Requisitions are processed in order of receipt in Purchasing. Please plan ahead to allow us enough time to complete the purchasing process.
c. If the order requires pre-payment you must provide us with the price source and whether shipping is included in the price. We prefer the actual order form, letter, etc. if that is not available, or you received the price quote by phone, please indicate the price and date you received the quote. We must be certain the pricing information is current.

2. **LOCAL PURCHASE ORDERS (LPO’s) - Under $500 with in Platteville city limits**

   a. Department chairpersons and fiscal agents may issue Local Purchase Orders (LPOs) as they deem necessary and appropriate, for **purchases totaling less than $500**.

   b. A copy of the local purchase order and the receipt/invoice from the vendor MUST be sent to Accounts Payable immediately after making such a purchase. Some vendors mail their statements daily.

   c. The local purchase order must be completely filled out, including the *quantity, description, unit price, and total*. We require an itemized bill from the vendor, and we must also have an itemized LPO in order to make payment.

   d. Keep in mind that Local Purchase Orders may not exceed $500. You may NOT issue two local purchase orders in one day, to the same vendor, in order to go over the $500 limit. It is the responsibility of the department to enforce this rule; the vendor is not necessarily going to refuse a sale of $500 or more.

   e. If you need to spend more than $500, please, submit a completed requisition to the Purchasing office *in advance*. If you need something in a hurry, you may fax a requisition to our office and we will assign it a confirming number immediately.

   f. Local Purchase Orders are to be used ONLY when you go to a business and pick up an item. Anything that has to be ordered by the store should be processed on a regular requisition. Local purchase orders are a one-time-use order. They can not be used one day for one item, and then held until the second item comes in.

   g. *Do not* use an LPO for food (store or restaurant purchases) printing, advertising, computer components, services, or other items that may have restrictions. Please call the purchasing office if you have any questions about using LPOs.

3. **LOW-DOLLAR/BEST JUDGEMENT PURCHASES - $5000 or less**

   a. The dollar limit for *best judgement* purchases is $5000 or less. The dollar amount applies to the total of the purchase order including shipping, not individual line items. It is your responsibility to *use your best judgement* and obtain products or services from a vendor that will give you the lowest price.

   b. The purchasing offices reserves the right to change the vendor on any purchase requisition in order to adhere to State of Wisconsin rules and regulations. There are products and services on State contracts that we are required to use, including but not limited to: copiers, computers and printers, all office supplies, MRO supplies and many other items.
4. **SIMPLIFIED BIDDING** - $5000 - $49,999

   a. Procurement procedures established by the State of Wisconsin, Department of Administration, require that all purchasing transactions of $5000 or more be competitively bid or price comparisons made prior to issuing a purchase order. You can usually buy more with the dollars you are budgeted if you go through the bidding process. Vendors just might sharpen their pencils when they know we are obtaining competitive quotes.

   b. Any item on a Wisconsin Department of Administration contract, UW System contract, or UW-Madison contract may be purchased without going through the bidding process. There is no limit to the dollar amount. Contact the Purchasing Office for more information on bulletins or contracts.

   c. Departments are authorized to obtain price quotations for purchases totaling $5000 - $49,999. However, the purchasing office reserves the right to solicit additional quotes as required by State policy.

   If you elect to solicit your own bids, you must include with your requisition the pricing information from all bidders. Three quotes are required; however you may solicit more if you wish. You may use catalogs, price lists, phone quotes, the Internet, etc., to obtain your price quotes.

   If at least three price quotes are not provided with the requisition, the item(s) may be sent out for written bids by the Purchasing Office.

   The low bid must be submitted in writing, on the bidder’s letterhead or other business form. An email quotation is acceptable. The written quote MUST be attached to the requisition.

   A form to use for simplified bidding is available from the Purchasing Office.

   The Purchasing office will obtain written quotes for you if you wish. You need to submit a requisition outlining the item to be purchased and include detailed specifications so we can solicit quotations for you. Brand name products must be bid on an **as-equal** basis. Please provide us with a bid list if you can.

5. **OFFICIAL SEALED BIDS** - $50,000 and higher (*Commodities*)

   The Purchasing Office must solicit official sealed bids when the total cost of any purchase order equals or exceeds $50,000 or more, and the product or service is not available on a contract.

   a. You will need to provide to Purchasing generic specifications in Microsoft Word format. The bid cover and body of the bid specifications must not reference a brand name or trade name of the product to be purchased.

   b. The bid will be awarded to the lowest bidder meeting all specifications. If a vendor submits the low bid, but does not meet all specifications we can not award to that bidder. Once a bid is open all information is available to the public.
c. The bid notice will be made available to State of Wisconsin VendorNet subscribers via the Internet and known vendor(s) not registered on the VendorNet website.

d. As a result of the bidding process, the specified brand may not be purchased, or may be purchased from a vendor other than the one indicated on the requisition.

6. PROJECT ORDERS

Any purchase using project funds must be submitted using the Project Order drop down with online form.

E. BLANKET ORDERS

1. Blanket orders are issued for your convenience to purchase miscellaneous supply items. They are not intended for the purchase of commodities or services that should be secured through the bidding process. Blanket orders should be used as a last resort all attempts should be made to use a p-card instead of a blanket purchase order.

2. Each department is responsible for monitoring the dollar amount left open on a blanket order. If a blanket order is completely used up and you continue to use that number it is considered an unauthorized purchase. When your blanket order starts to get low contact the Purchasing Office so the order can be increased.

3. A blanket order is an encumbrance against your budget. If you plan to spend only $150 for the entire year, do NOT request a blanket order for $1000. You will have tied up $850 you could have been using during the year. All blanket orders are canceled June 30th of each year. You must submit requests for new blanket orders every July 1st.

F. SOLE SOURCE

1. Any sole source request $5000 - $24,999.99 must have a sole source form included with the requisition sent to Purchasing. Simply stating that a vendor, product, or service is sole source is not sufficient reason and will not qualify as a 'sole source' purchase. Specifications supporting the product or service as unique are required.

2. A sole source request for $25,000 or more requires prior approval from the State of Wisconsin, Department of Administration. Contact the purchasing department for Soles Sources in this price range.

G. ADVERTISING PROCEDURES

Please keep in mind that all purchasing policies and procedures apply to advertising. For ads costing less than $5,000.00 use best judgment. Ads between $5,000 and $50,000 require three quotes when competition exists or a sole source document filled out when there isn't sufficient competition. Advertising over $50,000 requires a sealed bid process or a Governor's waiver from DOA when a sole source is required.

H. OFFICE SUPPLIES
All office supplies can be ordered through the campus Central Stores, UW Madison’s MDS store or directly from Staples (the State’s contracted vendor). Please contact the purchasing office for access to MDS or the Staples Advantage websites. To order through Central Stores:

- Go to UW Madison – MDS Website.
- Click on Been Here
- Under GUEST ACCOUNT click here
- Enter campus log in information
- Click on Staple link
- Enter item in SEARCH
- Fill out the Central Stores Requisition Form (available from Cathy Hastings at Central Stores) with the items you selected and send the form (keep all copies together) to Cathy.
- When the supplies arrived sign the form and send the white copy back to Cathy and keep the pink copy.

You may not purchase office machines, furniture, or other non-supply items. If you have any questions please call the purchasing office.

I. FURNITURE and SIGNAGE

The university is required to purchase furniture and signage from the Wisconsin Prison’s Industry, Badger State Industries (BSI). Items available through BSI include, but are not limited to: seating, desks, folding tables, computer workstations, file cabinets, door signs, informational signs, banners, etc. Item available from BSI can be viewed at their website, via a link on UW-Platteville’s Purchasing website. Other furniture needs can be addressed by using UW System and UW Madison contracts. Please contact the purchasing office for more information about buying furniture items.

J. COMPUTER HARDWARE AND SOFTWARE

All purchase requisitions for computer hardware over $100 and all software must have approval from the campus Office of Information Technology (IT) attached to the purchase requisition. There are many state contracts that we use to buy computer products and OIT can provide that information along with technical advice. Please call the IT office at 342-1421 if you have questions about purchasing computer products.

K. UNAUTHORIZED PURCHASES

1. An invoice presented without a purchase order is considered an unauthorized purchase. If you are responsible for such a purchase you need to complete a form justifying the purchase. State auditors require the completed form before the invoice can be paid.

2. We can NOT process a purchase order after-the-fact. If you need to call in an order, please contact contact the purchasing office and we will give you a confirming purchase order number.
3. **DO NOT** purchase any product or service without following the proper purchasing procedures. You could be held personally responsible for the bill.

**L. EMERGENCY REPAIRS**

Please call the purchasing office when you need something repaired on an emergency basis. We will ask for your account (department/org) code, name of the company fixing the item, a brief description of the item being repaired, and an estimated dollar amount.

**M. PRIZES, GIFTS and AWARDS**

When purchasing prizes, gifts and awards use the Explanation of Prizes, Awards or Gifts Form available at: http://www.uwplatt.edu/business/forms.html.

You cannot buy food for any purely entertainment event i.e. a birthday, going-away party, or Holiday party with State funds.

**N. PURCHASING (CREDIT) CARD**

A purchasing card is available to UW-Platteville employees for business and travel purchases. More information is available by following the link on the Purchasing homepage.

**O. PURCHASING FOOD FOR EVENTS**

When providing food for an event use the Events-Meal Payment form to follow the correct procedures. The form is available at: http://www.uwplatt.edu/business/forms.html

**P. CLOTHING PURCHASES**

Most University clothing purchases are taxable to the individual please refer to the campus clothing policy before buying departmental clothing: https://www.uwplatt.edu/files/financial/purchased-clothing-policy.pdf

**Q. Candidate Hosted Meals**

For guidance for hosting interview candidates over the meal period, refer to the Candidate Hosted Meals Policy at: https://www.uwplatt.edu/files/financial/candidate_hosted_meal_policy.pdf