

Texas Tech University Health Sciences Center

PURCHASING QUARTERLY
MEETING

TTUHSC PURCHASING

Agenda

- Contract Management Handbook
- Conflict of Interest & Ethics
- Purchasing Email
 - Sciquest.com emails
 - Correct email: purchasing@ttuhsc.edu
- TechBuy Updates
- Processing a TechBuy Order
 - Purchase Order Creation
 - Required Attachments
 - Required Approvals
- Steps to Request a Solicitation
- Payment Services
 - Travel Documentation and Checklist
 - PCard Checklist
 - Accounts Payable – PHI and PII
- Questions & Answers Period

Contract Management Handbook

The Contract Management Handbook was published in July. The Contract Management Handbook is a collaborative effort of the TTU-System and fulfills the mandate set out in Senate Bill 20 for all Texas State Agencies to implement a Contract Management Handbook (CMH). It is a guide on Contract Management, Ethical Standards and Policies, and links to Regents' Rules and Institutional Operating Policies and Procedures.

The link to the Contract Management Handbook can be found on the F&A Work Tools tab under Purchasing:

<http://www.fiscal.ttuhscc.edu/contracts/exhibits.aspx>

Contract Management Handbook

- We encourage you to review the CMH to become familiar with the general purchasing, contracting and solicitation process as outlined for the TTU-System.
- Additional information and training opportunities to be announced in the near future.

Conflict of Interest & Ethics

The Institution Shall evaluate any disclosed potential *Conflict of Interest* when contracting for Goods or Services. Institution employees or officials or certain family members have a financial interest in a private vendor, the Institution as a State agency is unable to enter into a Contract for the purchase of Goods or Services with the person.

Conflict of Interest & Ethics

General Requirements

- Employees should adhere to the highest level of professionalism in conducting official duties
- Employees should remain independent and free from the perception of impropriety

Standards of Conduct

- Governed by Federal and State laws and statutes
- Regents' Rules and Institutional Operating Policies regulate employee conduct in contracting
- Failure to follow these standards in contracting can lead to disciplinary action for employees and the Institution

Conflict of Interest & Ethics

Standards of Conduct

State employees shall not:

- Accept any gift favor, or service that can influence one's behavior, conduct, or official duties
- Accept employment or engage in a business or professional activity that would require or induce the disclosure of confidential information
- Accept other employment that could reasonably be expected to impair one's judgment in the performance of official duties
- Make personal investments that could create a conflict between the employee's private interest and the Institution's interest
- Solicit, accept, or agree to accept any benefit for having exercised one's official duties in favor of another
- Conceal any potential Conflicts of Interest with any contract or purchase of Goods or Services; and disclosure must be given to the Institution
- Contracts that provide financial interest to Institutional employees, officials, or their family members are prohibited

Conflict of Interest & Ethics

Non Disclosure Form:

- Contract Review Team Members (Exhibit E)
<http://www.fiscal.ttuhsc.edu/contracts/collateral/exhibits/Exhibit%20E.pdf>

Conflict of Interest and Ethics Guide OP's:

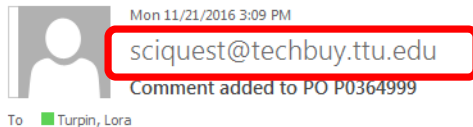
- Conflicts of Interest [OP 10.06](#)
- Standards of Conduct and Ethics Guide [OP 52.06](#)
(Exhibit C)

Purchasing Email

- **DO NOT** hit reply to system generated emails (emails that come from Sciquest).
- The email addresses, Purchasing SciQuest Support and SciQuest, are not TTUHSC Purchasing email addresses.
- Instead of replying, please forward the email to an intended recipient.
- To reach TTUHSC Purchasing, use the email address purchasing@ttuhsc.edu

Purchasing Email

DO NOT hit reply to emails with the address sciquest@techbuy.ttu.edu



Re: COMMENT ADDED TO PO #: P0364999

Dear Lora Turpin,

Lora Turpin has commented on PO P0364999

Comment: Test

To reply to this comment click on the following link

[View Comment](#)

TechBuy Support Team Contact Information: Sciquest.purchasing@mail.ttu.edu
+1 (806) 743-7841 purchasing@ttuhsc.edu

Thank you,
Texas Tech



GPO/COOP Contract Search Tool

GPO/COOP Contract Search Tool

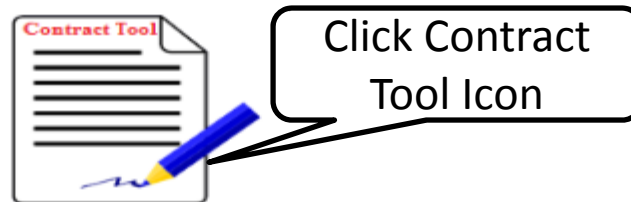
- This tool has created a consolidated way to search for and utilize contracts for purchase transactions. The contracts result from competitively bid vendor solicitations that meet Texas Procurement Code requirements and TTUHSC Purchasing processes. As a result, TTUHSC departments may qualify to purchase at higher dollar amounts without having to perform additional bidding steps.
- To access this tool enter TechBuy and go to the Home/Shop page. The Contract Search Tool icon is located towards the bottom of the announcements section.

*****New*** TTUHSC GPO/COOP Contract Search Tool**

Information about the [TTUHSC Group Contract Purchasing Strategy](#)

Choosing a contract vendor may mean bidding work has already been done for you!

Click on the icon below to search the 30,000+ record contract database:



GPO/COOP Contract Search Tool

GPO/COOP Contract Search Tool

- The search tool will require an eRaider sign in before allowing access.
- User instructions are located in the left hand column.

The screenshot shows the web interface of the Texas Tech University Health Sciences Center (TTUHSC) Finance & Administration TechBuy Contracts page. The header includes the TTUHSC logo and navigation links. A red banner highlights the 'GPO Contracts' section. A callout box labeled 'User Instructions' points to the 'User Instructions' link in the left sidebar. The main content area features a search form with a 'Keyword' field and a 'Search' button, and a 'New File Preview' section with a 'Browse...' button and a 'Preview' button.

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER.
Finance & Administration

TECHBUY CONTRACTS

GPO Contracts

User Instructions

eRaider Sign Out

GPO Contracts

This page is a GPO / COOP Contract search for established contracts that meet Texas Procurement Code requirements and TTUHSC Purchasing Processes. Although TTUHSC Purchasing actively solicits products and services of various types unilaterally, the breadth and scope of requirements to operate regionally located medical schools and clinics is wide and difficult to standardize. It is TTUHSC's practice to look for competitively awarded contracts through Group Purchasing Organizations and Cooperatives to which it is a party.

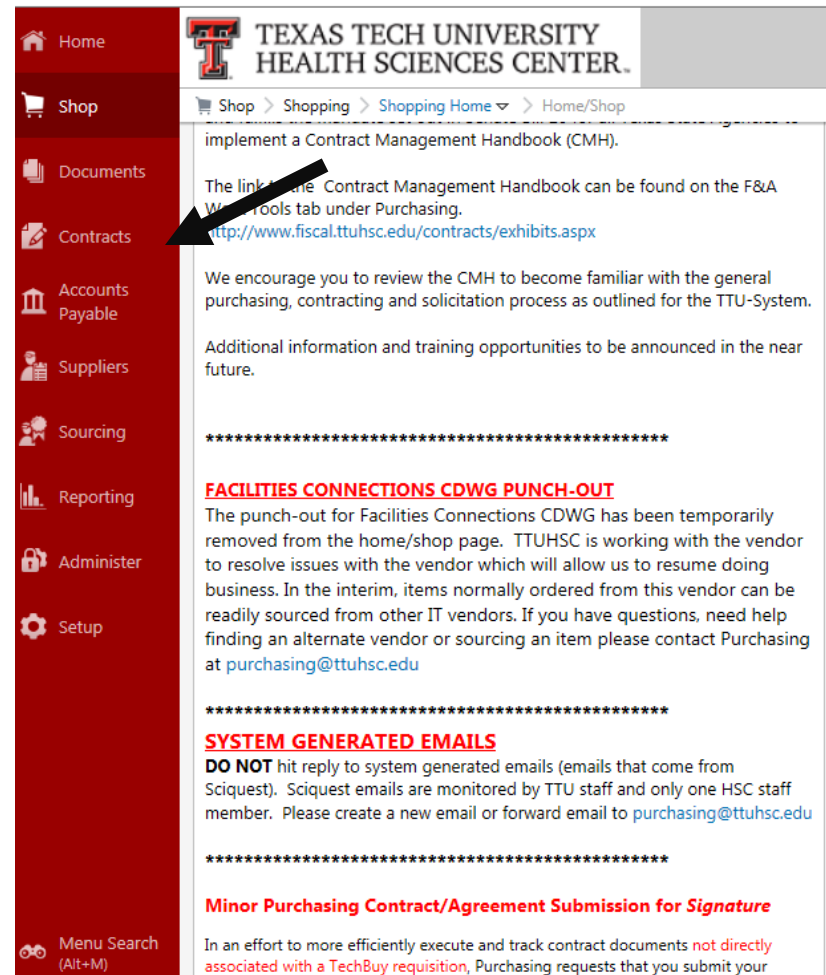
Search

Keyword: Search

New File Preview

TechBuy Updates

- The most noticeable update is the icon description on the left hand side of the home/shop page. You can expand the icons to provide a description.



Home Shop Documents Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

Menu Search (Alt+M)

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER

Shop > Shopping > Shopping Home > Home/Shop

implement a Contract Management Handbook (CMH).

The link to the Contract Management Handbook can be found on the F&A Web Tools tab under Purchasing.
<http://www.fiscal.ttuhscc.edu/contracts/exhibits.aspx>

We encourage you to review the CMH to become familiar with the general purchasing, contracting and solicitation process as outlined for the TTU-System.

Additional information and training opportunities to be announced in the near future.

FACILITIES CONNECTIONS CDWG PUNCH-OUT

The punch-out for Facilities Connections CDWG has been temporarily removed from the home/shop page. TTUHSC is working with the vendor to resolve issues with the vendor which will allow us to resume doing business. In the interim, items normally ordered from this vendor can be readily sourced from other IT vendors. If you have questions, need help finding an alternate vendor or sourcing an item please contact Purchasing at purchasing@ttuhsc.edu

SYSTEM GENERATED EMAILS

DO NOT hit reply to system generated emails (emails that come from Sciquest). Sciquest emails are monitored by TTU staff and only one HSC staff member. Please create a new email or forward email to purchasing@ttuhsc.edu

Minor Purchasing Contract/Agreement Submission for Signature

In an effort to more efficiently execute and track contract documents not directly associated with a TechBuy requisition, Purchasing requests that you submit your

TechBuy Updates

- The search documents feature has added a floating option box at the bottom of the page to allow the search button to appear at all times.

The screenshot displays the TechBuy search interface. At the top left, there is a 'Search' dropdown menu currently set to 'Purchase Orders'. To the right of this is a link labeled 'simple search'. The main search area is divided into three sections: 'Purchase Order Identification' with a text field for 'Purchase Order Number(s)'; 'Purchase Order Information' with fields for 'Participant(s)', 'Owner', 'Prepared By', 'Approved By', 'Sourcing Owner', 'Date' (with a 'Creation Date (System)' dropdown set to 'All Dates'), 'Total Amount', 'Supplier', 'Department', and 'Business Unit'; and 'Item/Product Information' with fields for 'Catalog Number(SKU)', 'Product Description', 'Commodity Code', 'Form Name', 'Form Type', and 'Product Flags'. The 'Product Flags' section includes checkboxes for 'Controlled substance', 'Green', 'Rad Minor', 'Recycled', 'Toxin', 'Energy Star', 'Hazardous material', 'Radioactive', and 'Select Agent'. At the bottom of the page, there is a navigation bar with links: 'Go to: simple search | my requisitions | my purchase orders | my invoices | my forms'. A black arrow points to a floating 'Search' button located at the bottom right of the page.

TechBuy Profile

- Verify profile contact information is correct and up to date.

The screenshot shows the TechBuy Profile page for Lora Turpin. The page has a red sidebar on the left with navigation links: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main content area is titled "Lora Turpin" and shows the user's name and ID (SZI960). Below this, there is a dropdown menu for "User Profile and Preferences" with options: "User's Name, Phone Number, Email, etc." (selected), "Language, Time Zone and Display Settings", and "Update Security Settings". The "User's Name, Phone Number, Email, etc." section contains fields for First Name (Lora), Last Name (Turpin), Phone Number (+1 (806) 743-7392), E-mail Address (LORA.TURPIN@ttuhsc.edu), Business Unit (Texas Tech University Health Sciences C), Department (HSC-PURCHASING - LUBBOCK (HSC-PL)), Position, Badge Id, User Name (SZI960), and Authentication Method (LoginXML). A "Save" button is at the bottom right. The footer of the page displays the Texas Tech University Health Sciences Center logo.

Home Shop Documents Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER.

My Profile > User's Name, Phone Number, Email, etc. ▾

Lora Turpin

User Name SZI960

User Profile and Preferences ▾

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

User's Name, Phone Number, Email, etc. ?

First Name Lora

Last Name Turpin

Phone Number 1 806 7437392
+1 (806) 743-7392
Country Code, Area, Phone Number, Extension

E-mail Address LORA.TURPIN@ttuhsc.edu Email User

Business Unit Texas Tech University Health Sciences C ▾

Department HSC-PURCHASING - LUBBOCK (HSC-PL) ▾

Position ▾

Badge Id

User Name SZI960

Authentication Method LoginXML ▾

Organization Terms and Conditions accepted on 11/1/2016 8:02 AM [Terms and Conditions](#)

Save

Processing a TechBuy Order

Determine the type of order to process

- Non-Catalog/Standing order
 - Order under \$5,000 (New limit under \$15,000)
 - Quote from vendor
- Informal Bid
 - Order total \$5,000-\$25,000 (New limits \$15,000.01-\$40,000)
 - Requires quotes from at least three vendors (2 from HUB vendors)
- Formal Solicitation
 - Order total \$25,000+ (New limits \$40,000.01+)
 - Requires Bid Supplier non-catalog to be submitted to request solicitation
 - Solicitation process is completed by the Purchasing department
- Sole Source
 - Only one vendor can supply the item/services
 - Sole Source form must be completed in detail and attached to the order

Processing a TechBuy Order

Processing a TechBuy Non-Catalog order or Standing order

Overview:

- In TechBuy select the Non-Catalog or Standing order form from the Home/Shop page.
 - Non-Catalog – One time purchase from vendor.
 - Standing Order – Open PO for items/services listed for the current FY.
- Complete each field and select add and go to cart.
 - The bold titles are required fields.
 - The non bold titles are optional fields.
- Please see following slides for step by step guide.

Processing a TechBuy Order

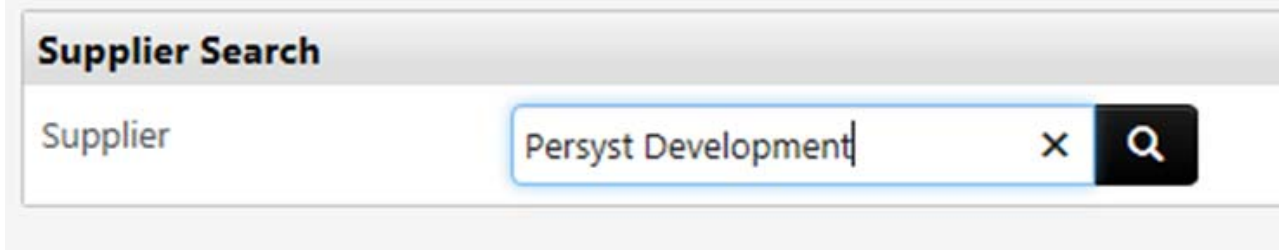
Select Supplier

- Select Supplier by clicking **Supplier Search** in the Enter Supplier



A screenshot of a web form titled "Non-Catalog Purchase Form". On the left, under the heading "Supplier", is a label "Enter Supplier". To the right of this label is a text input field. Below the input field, the text "or" is displayed, followed by two blue links: "Supplier Search" and "Enter Manually".

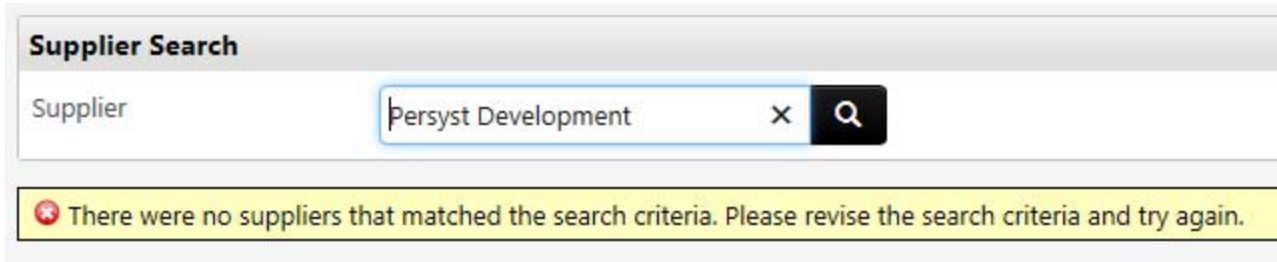
- Enter the Suppliers name



A screenshot of a web form titled "Supplier Search". It features a label "Supplier" on the left. To its right is a search input field containing the text "Persyst Development". To the right of the input field is a small "x" icon for clearing the text, and further right is a black button with a white magnifying glass icon for submitting the search.

Processing a TechBuy Order

- The suppliers name will appear if they are in the system. If an error states no suppliers were matched you will need to enter the suppliers information manually.



The screenshot shows a 'Supplier Search' form. The search input field contains 'Persyst Development' and has a search button (magnifying glass icon). Below the search field, a yellow error message box displays: 'There were no suppliers that matched the search criteria. Please revise the search criteria and try again.'

- Click on **Enter Manually** in the Enter Supplier field.



The screenshot shows the 'Non-Catalog Purchase Form'. Under the 'Supplier' section, there is an 'Enter Supplier' field. To the right of this field is a text input box. Below the input box, the text 'or' is displayed, followed by the links 'Supplier Search | Enter Manually'.

Processing a TechBuy Order

- Enter the Supplier's Name, Phone Number, Fax Number and Email. The contact information provided is used by the vendor team to request the W-9/W-8 information required for the vendor to be added to the system. The vendor team will contact the vendor when the requisition is received in the purchasing department.

Non-Catalog Purchase Form	
Supplier	
Supplier Name	<input type="text" value="Persyst Development"/>
DUNS No.	<input type="text"/>
Supplier Phone	<input type="text" value=""/> <input type="text" value="928"/> <input type="text" value="708-0705"/> <input type="text" value=""/>
	(Country, Area, Phone, Ext)
Supplier Fax No.	<input type="text" value=""/> <input type="text" value="928"/> <input type="text" value="771-1209"/> <input type="text" value=""/>
	(Country, Area, Phone)
Supplier Email	<input type="text" value="sales@persyst.com"/> <input type="button" value="x"/>
	cancel manual entry

Processing a TechBuy Order

Select Purchase Category

- Select the correct Purchase Category from the drop down list. The purchase category field is used to route the order to correct approvers and purchasing buyer.

Select Quantity, Packaging (UOM), and Unit Price

- Select the quantity of items being purchased. If a standing order is being created the quantity will be 1.
- Select the packaging (UOM) of the items being purchased.
 - Non-Catalog orders will vary based on items purchased. The majority are 1/EA.
 - If a standing order is being created the packaging (UOM) will be 1/LOT.

Processing a TechBuy Order

Product Description

- Enter descriptive information about the items/services being purchased. The first 250 characters will appear on the check stub. This field will be included on the purchase order when sent to the vendor.

Specifications/Long Text

- This field is used for additional specifications. This field is not sent to the vendor on the purchase order.

Processing a TechBuy Order

Shipping Information

- There are two selections for Shipping
 - Shipping cost included in line item – select this option when shipping has already been included in the line item.
 - Shipping is Prepaid and will be added to invoice – select this option when shipping was not included in the quote but will be added to the invoice.

Shipping Information

- ☒ Shipping Cost Included in Line Item
- ☐ Shipping is Prepaid and Will Be Added to Invoice

Prior Year PO Number

- Enter prior PO number in this field. This field is designed to reference back to the prior year and provide connection between the purchase orders. It is used by Purchasing to reference the prior year attachments, notes, etc. to provide consistency and accuracy.

Processing a TechBuy Order

Form submission

- Once all bold/required fields are completed the form is ready to be submitted to your cart. In the available actions drop down you can choose the following:
 - Add and go to cart
 - Add to cart and return
 - Add to cart
 - Add to draft cart or pending PR/PO
 - Add to PO Revision
 - Add to Favorites
 - Save
 - Add to new cart
- Select the appropriate action and click go.

Processing a TechBuy Order



Shopping Cart

- Once all line items are completed you will be taken to your cart to complete the requisition.
 - Click Proceed to Checkout to continue to the requisition.
 - Click Assign Cart to assign the cart to another user for approval.

The screenshot shows the TechBuy Shopping Cart interface. At the top, a red navigation bar displays the user name 'Lora Turpin', a star icon, 'Action Items' with a count of 9, 'Notifications', a shopping cart icon with '120.00 USD', and a search icon. Below this, a breadcrumb trail reads 'Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 48834900 - Draft Requisition'. The main header area shows 'Shopping Cart for Lora Turpin' with a 'Continue Shopping' link. A summary box indicates '1 Item(s) for a total of 120.00 USD' and contains 'Proceed to Checkout' and 'Assign Cart' buttons. Below the summary, there are links for 'Add Non-Catalog Item' and 'Empty cart'. The main table lists the cart items. The first item is 'Haworth Chair with arms, color: red and black' with a unit price of 120.00 USD, a quantity of 1, and a total of 120.00 USD. To the left of the table, there are buttons for 'Add to Favorites', 'Remove', and 'More Actions'. Above the table, there is a section for 'Officewise Furniture and Supply' with a 'PO Purchase Order 1' and an 'Edit' button. The table has columns for 'Product Description', 'Unit Price', 'Quantity', and 'Total'. The 'Product Description' column includes a link to 'open form...' and a 'more info...' link. The 'Unit Price' column shows '120.00 USD' and '1/EA'. The 'Quantity' column shows '1'. The 'Total' column shows '120.00 USD'.

Product Description	Unit Price	Quantity	Total
Haworth Chair with arms, color: red and black open form... Part Number: 1234 Contract: H-7110380 more info... Spec Furniture change... Commodity Code: <input type="text"/> Taxable: <input type="checkbox"/>	120.00 USD 1/EA	1	120.00 USD

Processing a TechBuy Order

- Complete all fields marked with  across the top of the cart. All fields must be marked with a green check  to submit the requisition. Please review all fields to verify the correct information has been entered.

Lora Turpin | Action Items 9 | Notifications | 120.00 USD | Logout

Shop | My Carts and Orders | Open My Active Shopping Cart | Line and Header FOAP Summary - 48834900 - Draft Requisition

General Shipping Billing **Line and Header FOAP Summary** Internal Notes and Attachments External Notes and Attachments Final Review

Submit Req or Assign Cart

Return to shopping cart Continue Shopping


Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Line and Header FOAP Summary** Supplier Info

Hide value descriptions

Line and Header FOAP Summary								
These values apply to all lines unless specified by line item								
Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program	Activity	Activity - Banner
H Texas Tech Univ Health Sciences Ctr	181183-H Purchasing	181183 Purchasing - Test	201181-H Purchasing Lbk	no value  Required field	no value	60-H Institutional Support	no value	no value

Processing a TechBuy Order

- Check PR approvals tab to view workflow of the order.

The screenshot displays the Texas Tech University Health Sciences Center TechBuy system interface. The top navigation bar includes the university logo, user name (Lora Turpin), and a shopping cart icon showing 22 items for 728.51 USD. The breadcrumb trail indicates the current location: Shop > My Carts and Orders > Open My Active Shopping Cart > Approvals - 76580823 - Draft Requisition. A horizontal progress bar shows the workflow steps: General, Shipping, Billing, Line and Header FOAP Summary, Internal Notes and Attachments, External Notes and Attachments, and Final Review (highlighted). A yellow message box states: "All documents have been completed and this request is ready to be submitted. Once you have completed the request, you may continue by clicking the button at the top of the page." A callout box labeled "PR Approval" points to the "PR Approvals" tab in the sub-navigation bar. The sub-navigation bar also includes Requisition, PO Preview, Comments, Attachments, and History. The main content area shows a workflow diagram with steps: Submitted Future (On behalf of: Debra Vaughn), Budget Authorization Future (view approvers), HSC Purchase Review Future, Create PO Future, and Finish.

Processing a TechBuy Order

Search for correct account code

- Select edit at the line and header FOAP summary.

Line and Header FOAP Summary								
Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program	Activity	Activity - Banner
H Texas Tech Univ Health Sciences Ctr	181183-H Purchasing	181183 Purchasing	201181-H Purchasing Lbk	730000-H SM Consumables	730000 SM Consumables	60-H Institutional Support	no value	no value

Click Edit

- Select from all values

Funding Information						
Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program
H Select from profile values... Select from all values...	181183-H Select from profile values... Select from all values...	181183 Select from all values...	201181-H Select from profile values... Select from all values...	730000-H Select from all values...	730000 Select from all values...	60-H Select from all values...

Click Select from all values

- Type item description and click search.

☐ Custom Field Search

Value

Description

Computer

×

Search

Processing a TechBuy Order

Search for correct account code

- Select appropriate code.

[Close](#)

[+ Click to filter search results ?](#)

Results Per Page	20	Values Found 12	Page 1 of 1
Value	Description		
726200-H	MR Computer Software	select	
726700-H	MR Computer Equipment Maint/Repair	select	
737700-H	OC Computer Equipment Expensed	select	
737800-H	OC Computer Equipment Controlled	select	
737900-H	CO Computer Equipment	select	
738001-H	OC Computer Software Expensed	select	
738002-H	OC Computer License Fees Expensed	select	
739500-H	CO Computer Software/License Fees	select	
739501-H	CO Computer Software Capitalized	select	
739502-H	CO Computer License Fees Capitalizd	select	
741100-H	RL Computer Equipment	select	
741500-H	RL Computer Software	select	

Results Per Page 20

Page 1 of 1

Processing a TechBuy Order

Search for correct account code

- The code selected will populate the account field.

Funding Information				
Chart	Fund	Fund - Banner	Organization	Account
H	181183-H	181183	201181-H	737700-H
Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from all values...	Select from profile values... Select from all values...	Select from all values...

Processing a TechBuy Order

- For Recurring Payments or Advanced Pays click on the final review tab.

The screenshot displays the TechBuy system interface for processing a draft requisition. The top navigation bar includes the user name 'Lora Turpin', a star icon, 'Action Items' with a count of 12, 'Notifications', a shopping cart icon with '120.00 USD', and a search icon. Below this, a breadcrumb trail shows 'Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - 48834900 - Draft Requisition', followed by a 'Logout' button. A horizontal progress bar contains seven tabs: 'General', 'Shipping', 'Billing', 'Line and Header FOAP Summary', 'Internal Notes and Attachments', 'External Notes and Attachments', and 'Final Review' (which is highlighted with a black arrow). To the right of the progress bar are two buttons: 'Submit Req' and 'Assign Cart', with the text 'or' between them. Below the progress bar, a yellow message box states: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' To the right of the message box are two links: 'Return to shopping cart' and 'Continue Shopping'. At the bottom, a tabbed interface shows 'Requisition' as the active tab, with other tabs including 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'.

Note: A state agency may not pay for goods or services before their delivery to the agency, unless the advance payment is necessary and serves a proper public purpose

Processing a TechBuy Order

- Scroll to the line item you would like to set for recurring or advanced pay. Click the edit button on each line item.

Supplier / Line Item Details ?

Hide line details

For selected line items

Officewise Furniture and Supply [more info...](#)

PO Purchase Order 1

1212 Avenue J, Lubbock, TX 79401-4020 US

Add non-catalog item for this supplier...

Contract H-7110380 [more info...](#)

PO Number To Be Assigned [View/edit by line item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	
1 Haworth Chair with arms, color: red and black more info...	1234	1/EA	120.00 USD	<input type="button" value="edit"/>
Taxable		x		
Replenish stock		x		
Commodity Code		no value		
Recurring Payment		x		
Advanced Pay		x		
Internal Note				
Internal Attachments				
add attachment...				
External Note		no note		
Attachments for supplier				
add attachment...				
Supplier subtotal			120.00USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	120.00
Total	120.00 USD

Processing a TechBuy Order

- Click the appropriate check box and click save.

Edit Line ? X

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	Haworth Chair with arms, color: red and black	1234	1/EA	120.00	1 EA	120.00 USD

Contract: H-7110380
Select price or contract...

Taxable ☐
Replenish stock ☐
Commodity Code
Recurring Payment ☐
Advanced Pay ☒

Internal Note

expand | clear

expand | clear

Click Save

Click appropriate box

Save Cancel

Processing a TechBuy Order

- Once all fields have been reviewed and have a green check, click Submit Req or Assign Cart.

Shop > My Carts and Orders > Open M... ary - 48834900 - Draft Requisition

Lora Turpin 0.00 USD

Logout

Submit Req or Assign Cart

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Internal Notes and Attachments. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Line and Header FOAP Summary** Supplier Info

Hide value descriptions

Line and Header FOAP Summary

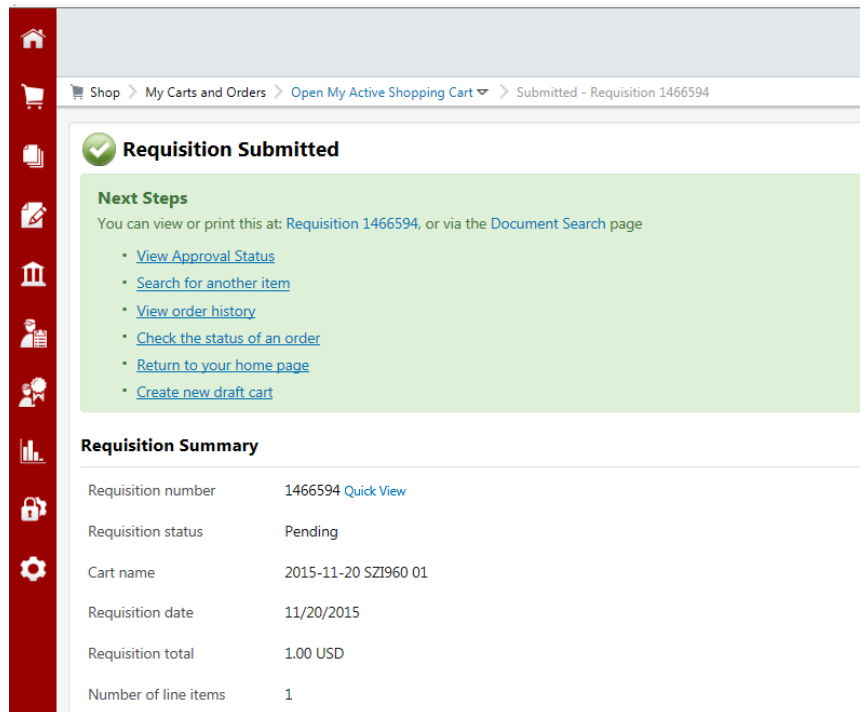
These values apply to all lines unless specified by line item

Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program	Activity	Activity - Banner
H Texas Tech Univ Health Sciences Ctr	181183-H Purchasing	181183 Purchasing - Test	201181-H Purchasing Lbk	733403-H OC Office Furniture Expensed	733403 OC Office Furniture Expensed	60-H Institutional Support	no value	no value

edit

Processing a TechBuy Order

- Once submitted you will receive a notification with the requisition number for your records.



Shop > My Carts and Orders > Open My Active Shopping Cart > Submitted - Requisition 1466594

Requisition Submitted

Next Steps
You can view or print this at: [Requisition 1466594](#), or via the [Document Search](#) page

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Requisition Summary

Requisition number	1466594 Quick View
Requisition status	Pending
Cart name	2015-11-20 SZI960 01
Requisition date	11/20/2015
Requisition total	1.00 USD
Number of line items	1

Processing a TechBuy Order

Required Attachments (Word or PDF documents)

- Quote – A valid quote is required to be attached on all requisitions. A quote is considered to be valid 30 days after the quote date unless an expiration date is stated.
- ICQ (Independent Contractor Questionnaire) – ICQ's must be attached to orders that an individual is providing a service to the institution.
- COI (Certificate of Insurance) – A COI is required when work/labor/delivery is being provided on the institutions property.
- Artwork – TTUHSC artwork (Seal, Double T, etc.) is to be attached to requisitions when being printed on items (promotional items, lab coats, etc).

Processing a TechBuy Order

Attachments containing Personal Health Information (PHI) or Personally Identifiable Information (PII)

- Personal Health Information (PHI) or Personally Identifiable Information (PII) should not be added in TechBuy through Comments or Attachments
- If a document includes this information, it must be redacted prior to scanning and attaching in TechBuy.
- If you have questions please contact Purchasing@ttuhsc.edu

Processing a TechBuy Order

Required Approvals

- IT – Approval is required on all TTUHSC IT related purchases (Computers, software, etc). If the account code or category selected is IT related the order will route to IT. If not, Purchasing will request approval from IT and will not approve until approval is received.
- Communications and Marketing – Approval is required on all TTUHSC artwork. Please allow additional time for Purchasing to route the order to them for approval.
- EH&S – Approval is required on all hazardous and radio active purchases. If the category chemicals and gases-radioactive is selected the order will be automatically routed. If not, Purchasing will request approval from EH&S and will not approve until approval is received.
- Pharmaceuticals – Approval is required from designated SOP representative. If the category Pharmaceuticals is selected the order will be automatically routed. If not, Purchasing will request approval from designated SOP representative and will not approve until approval is received.

Steps To Request a Solicitation (e.g. Bid, RFP, RFI)

- To request a solicitation please follow the steps below. These steps are posted on the TechBuy home/shop page in the announcements section.
 - Department will submit a TechBuy Requisition on Non-Catalog Form with selected vendor “Bid Supplier”
 - Requisition should include:
 - Specification or Statement of Work
 - Adequate and appropriate financial budget for product/services requested
 - Three to five named individuals to serve as proposal evaluators
 - Email addresses of any preferred vendor contracts for notification of solicitation when published
 - One named point of contact to assist with specification development, approve final solicitation document, and provide response to vendor participant questions


Payment Services - Travel

Travel Documentation and Travel Voucher Checklist

If travel is to attend a conference, a Conference Fact Sheet or Agenda is required for supporting documentation. The following information must be included:

- Full Conference Name
- Conference Location – city and state
- Conference begin and end dates and times

If you have questions about documentation required with applications and vouchers, please see the [Travel Voucher Checklist](#).

 TRAVEL VOUCHER CHECKLIST	
COMMERCIAL AIR DOCUMENTATION	
<input type="checkbox"/>	Airfare receipt required: <ul style="list-style-type: none">✦ Receipt must verify the following information:<ul style="list-style-type: none">Name of TravelerComplete itinerary with confirmation of travel dates and locationsBooking classConfirmation of payment
<input type="checkbox"/>	If airfare receipt does not confirm payment/payment method, include a copy of the traveler's bank or credit card statement verifying the airfare amount posted to their account. ALL PROTECTED INFORMATION MUST BE REDACTED OR VOUCHER WILL BE RETURNED TO YOU.
<input type="checkbox"/>	If airfare receipt indicates a ticket exchange was utilized for payment, include any/all original airfare receipts that were utilized for the exchange.
<input type="checkbox"/>	Early bird-check in is not reimbursable. If purchased, remove from the reimbursement amount.
<input type="checkbox"/>	Business Select class and seat upgrades may be paid or reimbursed if they are the only available airfare. You must provide local funding for Business Select and upgrades.
<input type="checkbox"/>	BTA (Business Travel Account) – If using state funds (Funds beginning with 10 or 12) must use National Travel Systems (NTS) travel agency for commercial airfare reservations.
FOOD & ENTERTAINMENT	
<input type="checkbox"/>	Itemized receipt is required.
<input type="checkbox"/>	Clearly state the Business Purpose of the meeting.
<input type="checkbox"/>	List all attendees and titles.
<input type="checkbox"/>	No restricted funds. F & E expenses must be allocated to local FOP's only.
<input type="checkbox"/>	Alcohol is NOT reimbursable on any fund through Travel.

Payment Services - PCard

Purchasing Card (PCard) – Reminders

- HSC OP 72.15 – All permitted purchases of \$5,000 or less can be made using the Purchasing Card subject to the vendor accepting the card. Permitted purchases are all categories of purchases except those listed in the Prohibited Uses section of the OP.
- Any exception must have prior written approval from Purchasing and included with other documentation regarding the purchasing card transaction included in the monthly expense report.
- Prohibited and Permitted Purchases and Purchases that have additional requirements are easily identified in the [Purchasing Card Checklist](#).



Payment Services - PCard

Prohibited Purchases

- Awards and Prizes (see [OP 72.03](#))
- Chemicals and Other Potentially Hazardous Materials
- Consulting, Medical Services, Personal or Professional Services
- [Controlled Assets](#)
- Donations, Contributions and Sponsorships
- E Bay Purchases
- Individual Amazon Prime Accounts
- Lease or Rental of Space
- Medical Licenses for States Other Than the State of Texas
- Notary Applications
- Payments to Patient/Study Participants
- PayPal Services
- Supplies (require use of Institutional Supply Contract)
- Temporary Personnel
- Travel Related Purchases
- Uniforms (includes lab coats)
- Blocked Vendors
- In-State Sales Tax, Including Tax on Carry-Out or Delivered Meals

Additional Guidance

- Prohibited Purchases on State and Federal Funds: Alcohol, Flowers, Food and Entertainment, Membership Dues, Promotional Items
- Purchases for Food and Entertainment Must be Documented Using [Food and Entertainment Substantiation Form](#) and [Pre-Approval Form](#) (> \$500)
- Alcoholic Beverages May Only be Served on Campus at Appropriate Events with Prior Written Approval of the President
- Purchases Not Available From a Contracted Vendor Must Have Approval from Purchasing
- Ship To Location Other Than TTUHSC Address Requires Approval from Purchasing
- Organization Must be on the [Professional Membership List](#) for Payment of Membership Dues
- Gifts for Length of Service Including Retirement (< \$400) and Non-Cash Gifts for Donors or Participants of Official Functions - must include [OP 72.03 Attachment B](#)

Permitted Purchases

- Permitted Purchases of \$5,000 or Less Must be Made Using PCard Subject to Vendor Accepting Credit Cards
- Malpractice Insurance
- Flowers for Official TTUHSC Functions or for Employees and Immediate Family Members in Cases of Illness or Death
- Food and Entertainment
- Hand Held Computer Devices Less Than \$500
- Books (if not available through an institutional contract in TechBuy)
- Equipment (if not available through an institutional contract in TechBuy)
- Advertising in Out-of-State Newspapers and Online for Staff Recruitment
- Accreditation, Certification and Examination Fees
- Magazine/Journal Subscriptions
- Membership Dues
- Professional License Fees
- Registration Fees

[Printable PCard Checklist](#)

Payment Services - Accounts Payable

Attaching Invoices in TechBuy – No PHI or PII

Personal Health Information (PHI) or Personally Identifiable Information (PII) should not be added in TechBuy through Comments or Attachments

- If a vendor statement includes this information, it must be redacted prior to scanning and attaching in TechBuy.
- If you have questions please contact Accounts.Payable@ttuhsc.edu.

Questions & Answers

Questions?