

# 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](mailto: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.ttuhscc.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](mailto:purchasing@ttuhsc.edu)

# Purchasing Email

DO NOT hit reply to emails with the address [sciquest@techbuy.ttu.edu](mailto: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](mailto:Sciquest.purchasing@mail.ttu.edu)  
+1 (806) 743-7841 [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu)

Thank you,  
Texas Tech



# GPO/COOP Contract Search Tool

## GPO/COOP Contract Search Tool

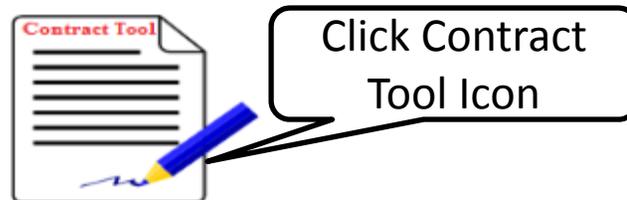
- This tool has created a consolidated way to search for and utilize contracts for purchase transactions. The contracts result from competitively bid vendor solicitations that meet Texas Procurement Code requirements and TTUHSC Purchasing processes. As a result, TTUHSC departments may qualify to purchase 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.

TEXAS TECH UNIVERSITY  
HEALTH SCIENCES CENTER.  
Finance & Administration

TECHBUY CONTRACTS

GPO Contracts

User Instructions

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.ttuhsoc.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.

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**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](mailto: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](mailto: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 a search interface for 'Purchase Orders'. At the top left, there is a 'Search' dropdown menu set to 'Purchase Orders' and a 'simple search' link. The form is organized into several sections:

- Purchase Order Identification:** A text input field for 'Purchase Order Number(s)'.
- Purchase Order Information:** Radio buttons for 'Any', 'Me', and 'Pick...'. Below are text input fields for 'Participant(s)', 'Owner', 'Prepared By', 'Approved By', and 'Sourcing Owner'. A 'Date' dropdown is set to 'All Dates'. Text input fields for 'Total Amount', 'Supplier', 'Department', and 'Business Unit' are also present.
- Item/Product Information:** Text input fields for 'Catalog Number(SKU)', 'Product Description', 'Commodity Code', 'Form Name', and 'Form Type'. A 'Product Flags' section includes checkboxes for 'Controlled substance', 'Green', 'Rad Minor', 'Recycled', 'Toxin', 'Energy Star', 'Hazardous material', 'Radioactive', and 'Select Agent'.
- Contract Information:** A partially visible section at the bottom.

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 center of the page.

# TechBuy Profile

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

The screenshot displays the TechBuy profile page for Lora Turpin. The page is titled "User's Name, Phone Number, Email, etc." and includes a "Save" button at the bottom. The user's name is Lora Turpin, and their user name is SZI960. The contact information includes a phone number of +1 (806) 743-7392 and an email address of LORA.TURPIN@ttuhsc.edu. The user is associated with the Texas Tech University Health Sciences Center, Department of HSC-PURCHASING - LUBBOCK (HSC-PL). The user's position is not specified. The user's badge ID is not specified. The user's authentication method is LoginXML. The user's organization terms and conditions were accepted on 11/1/2016 at 8:02 AM.

**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. (Selected)

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



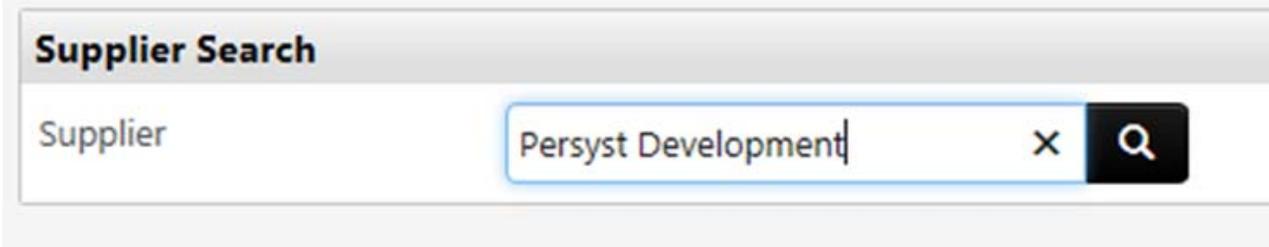
Non-Catalog Purchase Form

Supplier

Enter Supplier

or  
[Supplier Search](#) | [Enter Manually](#)

- Enter the Suppliers name

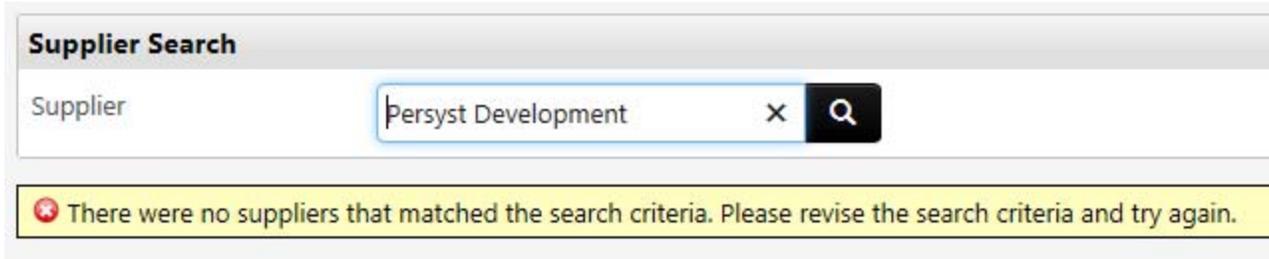


Supplier Search

Supplier

# 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.



Supplier Search

Supplier

 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.



Non-Catalog Purchase Form

Supplier

Enter Supplier

or  
[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	
<b>Supplier</b>	
<b>Supplier Name</b>	<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"/>
	(Country, Area, Phone, Ext)
Supplier Fax No.	<input type="text" value=""/> <input type="text" value="928"/> <input type="text" value="771-1209"/>
	(Country, Area, Phone)
Supplier Email	<input type="text" value="sales@persyst.com"/> <input type="button" value="x"/>
	<a href="#">cancel manual entry</a>

# 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 a shopping cart interface for 'Officewise Furniture and Supply'. The cart contains one item: 'Haworth Chair with arms, color: red and black'. The total amount is 120.00 USD. The interface includes a navigation bar with the user's name 'Lora Turpin', a search icon, and a shopping cart icon showing '120.00 USD'. Below the navigation bar, there are links for 'Shop', 'My Carts and Orders', 'Open My Active Shopping Cart', and 'Cart - 48834900 - Draft Requisition'. The main content area shows the item details, including the product description, unit price, quantity, and total. There are also buttons for 'Proceed to Checkout' and 'Assign Cart'.

Shopping Cart for Lora Turpin

1 Item(s) for a total of 120.00 USD

Proceed to Checkout or Assign Cart

Have you made changes? [Update](#)

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

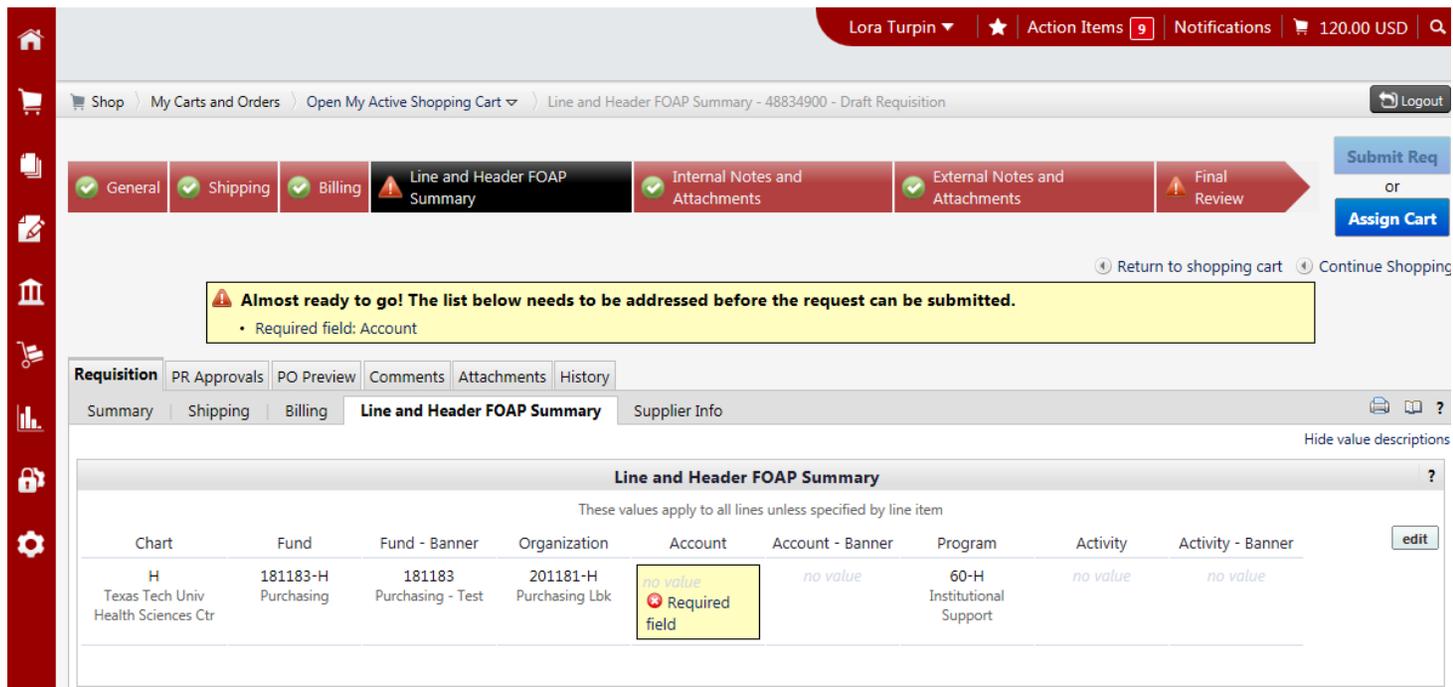
PO Purchase Order 1 [Edit](#)

1212 Avenue J, Lubbock, TX 79401-4020 US

Product Description	Unit Price	Quantity	Total
<b>Haworth Chair with arms, color: red and black</b> <a href="#">open form...</a> Part Number: 1234 Contract: H-7110380 <a href="#">more info...</a> Spec Furniture <a href="#">change...</a> 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.



The screenshot displays the TechBuy system interface for a requisition. At the top, a navigation bar shows the user's name (Lora Turpin), a star icon, 'Action Items' (9), 'Notifications', and a cart icon with '120.00 USD'. Below this, a breadcrumb trail reads 'Shop > My Carts and Orders > Open My Active Shopping Cart > Line and Header FOAP Summary - 48834900 - Draft Requisition'. A secondary navigation bar contains tabs for 'General', 'Shipping', 'Billing', 'Line and Header FOAP Summary' (highlighted with a warning icon), 'Internal Notes and Attachments', 'External Notes and Attachments', and 'Final Review'. To the right of these tabs are buttons for 'Submit Req' or 'Assign Cart'. A yellow warning box states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' with a sub-item: 'Required field: Account'. Below the warning, a tabbed interface shows 'Requisition' selected, with sub-tabs for 'Summary', 'Shipping', 'Billing', 'Line and Header FOAP Summary', and 'Supplier Info'. The 'Line and Header FOAP Summary' section contains a table with the following data:

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 user interface for processing a TechBuy order. At the top, the header includes the Texas Tech University Health Sciences Center logo, the user name 'Lora Turpin', and a shopping cart icon with a value of 728.51 USD. The breadcrumb trail shows the path: Shop > My Carts and Orders > Open My Active Shopping Cart > Approvals - 76580823 - Draft Requisition. A navigation bar contains several tabs: General, Shipping, Billing, Line and Header FOAP Summary, Internal Notes and Attachments, External Notes and Attachments, and Final Review. A yellow notification box states: 'All documents have been completed and this request is ready to be submitted. Once you have completed the review, you may continue by clicking the button at the top of the page.' Below this, the 'PR Approvals' tab is selected, showing a workflow diagram. The workflow starts with 'Submitted Future' (On behalf of: Debra Vaughn), followed by 'Budget Authorization' (Future), 'HSC Purchase Review' (Future, with a 'view approvers' link), and 'Create PO' (Future), ending with a 'Finish' icon.

# Processing a TechBuy Order

## Search for correct account code

- Select edit at the line and header FOAP summary.



The screenshot shows a table titled "Line and Header FOAP Summary" with the following data:

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

An "edit" button is located at the end of the table row, highlighted by a callout box with the text "Click Edit".

- Select from all values

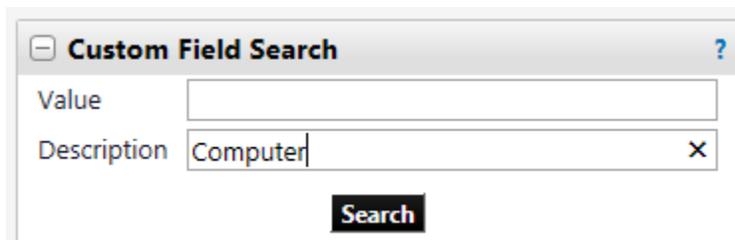


The screenshot shows the "Funding Information" form with the following fields:

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...	

A callout box with the text "Click Select from all values" points to the "Account" dropdown menu.

- Type item description and click search.



The screenshot shows the "Custom Field Search" dialog box with the following fields:

Value	<input type="text"/>
Description	Computer <input type="text"/>

A "Search" button is located at the bottom of the dialog box.

# 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	<a href="#">select</a>
726700-H	MR Computer Equipment Maint/Repair	<a href="#">select</a>
737700-H	OC Computer Equipment Expensed	<a href="#">select</a>
737800-H	OC Computer Equipment Controlled	<a href="#">select</a>
737900-H	CO Computer Equipment	<a href="#">select</a>
738001-H	OC Computer Software Expensed	<a href="#">select</a>
738002-H	OC Computer License Fees Expensed	<a href="#">select</a>
739500-H	CO Computer Software/License Fees	<a href="#">select</a>
739501-H	CO Computer Software Capitalized	<a href="#">select</a>
739502-H	CO Computer License Fees Capitalizd	<a href="#">select</a>
741100-H	RL Computer Equipment	<a href="#">select</a>
741500-H	RL Computer Software	<a href="#">select</a>

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.

Lora Turpin | Action Items 12 | Notifications | 120.00 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - 48834900 - Draft Requisition

Submit Req or Assign Cart

Return to shopping cart | Continue Shopping

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.

Requisition | PR Approvals | PO Preview | Comments | Attachments | 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	
<b>1</b> <b>Haworth Chair with arms, color: red and black</b> <a href="#">more info...</a>	<b>1234</b>	<b>1/EA</b>	<b>120.00 USD</b>	<input type="checkbox"/> <input type="button" value="edit"/>
Taxable		x		
Replenish stock		x		
Commodity Code		no value		
Recurring Payment		x		
Advanced Pay		x		
Internal Note				
Internal Attachments				<a href="#">add attachment...</a>
External Note		no note		
Attachments for supplier				<a href="#">add attachment...</a>
<b>Supplier subtotal</b>			<b>120.00USD</b>	

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.

<b>Subtotal</b>	<b>120.00</b>
<b>Total</b>	<b>120.00 USD</b>

Click edit

# Processing a TechBuy Order

- Click the appropriate check box and click save.

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

Save Cancel

Click appropriate box

Click Save

# Processing a TechBuy Order

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

All fields contain green checks

Click submit requisition or assign cart

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

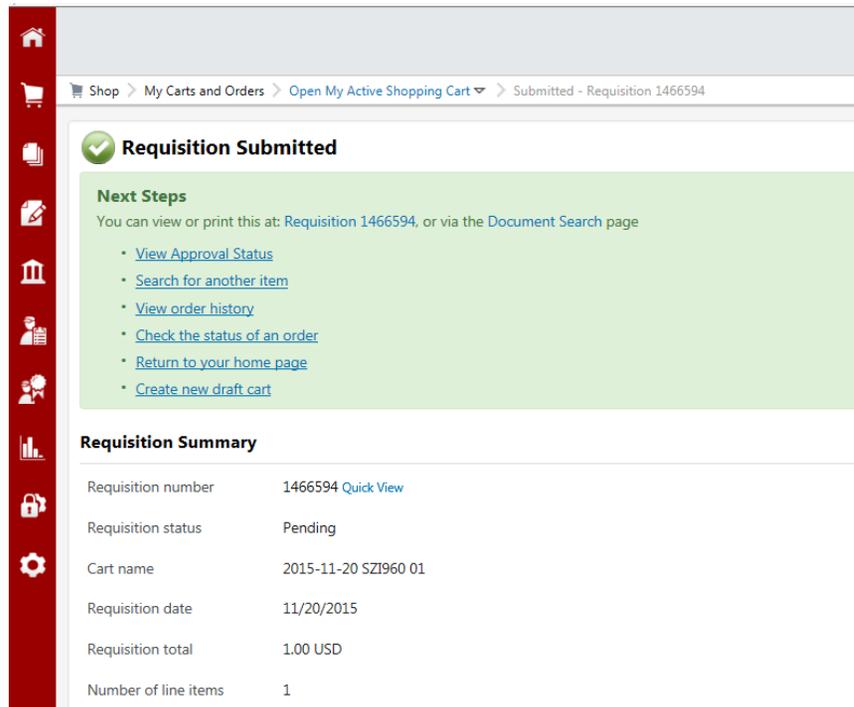
Summary | Shipping | Billing | **Line and Header FOAP Summary** | Supplier Info

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

# Processing a TechBuy Order

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



The screenshot displays a web interface with a red sidebar on the left containing various icons. The main content area shows a breadcrumb trail: Shop > My Carts and Orders > Open My Active Shopping Cart > Submitted - Requisition 1466594. Below this, a green notification box with a checkmark icon states 'Requisition Submitted'. Underneath, a 'Next Steps' section provides instructions and links: 'You can view or print this at: [Requisition 1466594](#), or via the [Document Search](#) page'. A list of links includes: [View Approval Status](#), [Search for another item](#), [View order history](#), [Check the status of an order](#), [Return to your home page](#), and [Create new draft cart](#). Below the notification is a 'Requisition Summary' table.

Requisition Summary	
Requisition number	1466594 <a href="#">Quick View</a>
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](mailto: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
<b>COMMERCIAL AIR DOCUMENTATION</b>
<input type="checkbox"/> Airfare receipt required: <ul style="list-style-type: none"><li>✦ Receipt must verify the following information:<ul style="list-style-type: none"><li>Name of Traveler</li><li>Complete itinerary with confirmation of travel dates and locations</li><li>Booking class</li><li>Confirmation of payment</li></ul></li></ul>
<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. <b>ALL PROTECTED INFORMATION MUST BE REDACTED OR VOUCHER WILL BE RETURNED TO YOU.</b>
<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 1D or 12) must use National Travel Systems (NTS) travel agency for commercial airfare reservations.
<b>FOOD &amp; ENTERTAINMENT</b>
<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](#).

HSC Home > Finance & Administration > Business Affairs > Payment Services > Purchasing Card >

## Purchasing Card Checklist

**Prohibited Purchases**      **Additional Guidance**      **Permitted Purchases**

PURCHASING CARD ONLINE TOOLS

- Purchasing Card Home
- Documents
- FY17 Citi Billing Cycle Schedule
- Operating Policies
- Purchasing Card Checklist
- Professional Societies List
- Update Archive
- Contacts

# 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](mailto:Accounts.Payable@ttuhsc.edu).

# Questions & Answers

## Questions?