

# Texas Tech University Health Sciences Center

PURCHASING QUARTERLY  
MEETING

TTUHSC PURCHASING

# Agenda

- Equipment Trade Ins
  - Updated Guidance Document
- Safety Services Chemical Workflow
  - New Workflow
  - Include Principal Investigator in General Section
- Tax Compliance
  - Updated Non-Catalog form
  - Updated ICQ Form
  - New Workflow
- Purchasing Contacts
- Purchasing Email
  - Sciquest.com emails
  - Correct email: [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu)

# Agenda

- PCard
  - Pcard Reminders
  - Purchasing Approvals and Deviations
  - Amazon Business Account
- Travel
- Questions and Answer Period

# Equipment Trade Ins

The equipment Trade In/Used Equipment guidance document has been updated and posted on the purchasing website.

<http://www.fiscal.ttuhscc.edu/purchasing/collateral/Guidelines%20for%20Trade-Ins%20and%20Used%20Equipment.pdf>

A fund manager may have existing property and offer it as a trade on new property of the same general type when such exchanges are in the best interest of TTUHSC. However, a state agency may not trade property that has been declared either surplus or salvage; such property must be disposed of under applicable state law. Trades are not allowed on the state term contract.

# Equipment Trade Ins

Equipment may be purchased with a trade of equipment of a similar type if the following requirements are provided on the requisition:

- Describe the age, condition, make, model and serial number (if applicable) of the used equipment.
- Provide a realistic estimate of the used equipment's value.
- Include the following statement on the TechBuy requisition "Less trade-in at State's option: to be picked up by the successful bidder where is, as is"
- (give a deadline time/date to remove trade-in).
- Enter each trade allowance as an individual item.
- Include the TTUHSC inventory tag number for each item if applicable.
- Attachment found in HSC OP 63.10 Departmental Certification for removal of an Inventoried Item form must be completed and attached to requisition.

**Note: the property custodian is responsible for reporting the pickup of tagged equipment. Refer to OP 63.10 for specific instructions.**

# Equipment Trade Ins

Departmental Certification for removal of an inventoried item form.

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER  
Departmental Certification for Removal of an Inventoried Item

Department:		Orgn Code:	
Items listed below will be used as trade-ins towards the purchase of new equipment associated with Requisition #: _____			
Property custodian's signature indicates that all items have been examined, all confidential information has been removed and items are free of hazardous material (per HSC OP 7505).			
Property Custodian:		Date:	
(signature)			

Items Used as Trade-In			
Tagged Y/N	Tag #	Description	Amount

New Items from Requisition			
Line #	Product Description	Unit Price	Trade-In Value Applied to this Item

# Safety Services Chemical Workflow

Purchasing has recently created a new workflow for chemical purchases. All chemical purchases are routing to the Safety Services department for review and approval. Items that do not follow or meet Safety Services requirements will be returned to the submitter for correction/modification. Within TechBuy, Safety Services orders are routed based on several factors such as account code, vendor name and purchasing category.

Please make sure to code items correctly and select the correct purchasing category to avoid delay.

Please include the Principal Investigator's name in the General Section of the requisition. This helps Safety Services keep track of inventory.

If you have any questions or would like to check the status of an Safety Services order please contact purchasing at [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).

# Tax Compliance

On April 17, 2017, Purchasing will be releasing a new non-catalog form to include buttons to select if an Independent Contractor Questionnaire (ICQ) is required/attached. If yes is selected the order will route to Tax Compliance for review.

<b>Other Information</b>	
Prior Year PO Number	<input type="text"/>
Independent Contractor Questionnaire (ICQ) Required/Attached	<input checked="" type="radio"/> Yes <input type="radio"/> No

Please make sure to select the correct button to avoid delay.



# Tax Compliance

A link to the ICQ has also been added to the non-catalog form for convenience.

**Sole Source or Proprietary Purchase Justification**

Add form as an internal attachment to requisition.

[Sole Source and Propriety Justification Form](#) ↗

**Independent Contractor Questionnaire (ICQ)**

Add form as an internal attachment to requisition.

[Independent Contractor Questionnaire](#) ↗

If you have any questions or would like to check the status of an Tax Compliance order please contact purchasing at [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).

# Tax Compliance

## Non-Catalog Form

Available Actions: [Add and go to Cart](#) [Go](#) [Close](#)

### Non-Catalog Purchase Form

#### Supplier

Enter Supplier

or

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

#### Purchase Category

Purchase Category

Form Type

HSC Non-Catalog Form

#### General Item Information

Catalog No.

Quantity

Packaging (UOM)

Unit Price

#### Description of Items or Services

254 characters remaining

[expand](#) | [clear](#)

Specifications/Long Text

2000 characters remaining

[expand](#) | [clear](#)

#### Shipping Information

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

#### Other Information

Prior Year PO Number

Independent Contractor Questionnaire (ICQ) Required/Attached

- ☐ Yes  
☐ No

New ICQ selection

#### Sole Source or Proprietary Purchase Justification

Add form as an internal attachment to requisition.

[Sole Source and Propriety Justification Form](#)

#### Independent Contractor Questionnaire (ICQ)

Add form as an internal attachment to requisition.

[Independent Contractor Questionnaire](#)

Link to ICQ

# Tax Compliance

When is an ICQ required?

- Payments for **services**
- Payments to Individuals
- Payments to businesses operated by an individual as sole proprietorships

When is an ICQ **not** required?

- Payments for Goods (where no services are provided)
- Payments to Partnerships
- Payments to Corporations
- Payments to individuals for research participation

# Tax Compliance

## Updated ICQ form

- On April 1, 2017, Tax Compliance posted an updated ICQ form. Please make sure to use the updated form when submitting new requisitions.
- [Independent Contractor Questionnaire \(ICQ\)](#)
- Beginning June 1, 2017 only the updated version will be accepted. Older versions will be rejected.

# Purchasing Contacts

## REMINDER

- Please contact the **Buyer** of the order when contacting Purchasing.
- The **Buyer** is most familiar with the order they processed and can help with questions or change orders needing processed.
- The **Buyer** name is located in the shipping area under buyer information.
- If the **Buyer** is not available please contact [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu)

# Purchasing Contacts

[Add Non-Catalog Item](#)

**Requisition** | [PR Approvals](#) | [PO Preview](#) | [Comments \(4\)](#) | [Attachments \(5\)](#) | [History](#)

**Summary** | [Shipping](#) | [Billing](#) | [Line and Header FOAP Summary](#) | [Supplier Info](#)

[Hide header](#)

General		Shipping	
Status	Pending <a href="#">edit</a>	<b>Ship To</b> <a href="#">edit</a>	
Submitted	HSC Buyer 9 (Darlene Durham)	Contact Name Allison Kerin	
Cart Name	9/15/2016 8:07 AM	Phone +1 (806) 743-6462	
Description	Staff Senate 2016-2017 Jackets	Email allison.kerin@ttuhsc.edu	
Priority	no value	Tx Tech Univ HSC	
Prepared by	Normal	3601 4TH ST	
Principal Investigator	Rebecca Ramirez	Rm/STOP STOP 8100	
Purchase Order Classification	no value	LUBBOCK, TX 79430	
Texas SmartBuy PO #	GG	United States	
LBB Field	Choice Partners		
	no value	<b>Cardinal Account Code</b> <a href="#">edit</a>	
	no value	Medical/Surgical Supplier Account Code	21179940
			Pharmacy Practice
		<b>Delivery Options</b> <a href="#">edit</a>	
		Expedite	x
		Ship Via	Best Carrier-Best Way
		Requested Delivery Date	no value
		<b>Buyer Information</b>	
		Buyer Name	Buyer Phone Number
		Darlene Durham	806-743-7841
			HSC Purchasing Phone Number

[View/edit by line item...](#)

# 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)

# PCard Reminders

- **The PCard is a method of payment for goods and must adhere to purchasing policies and guidelines.**
- Use institutional contracts with vendors through TechBuy to gain the best pricing. - Examples
  - Office Supplies – Summus Staples
  - Desktops and Laptops – Summus Dell
  - Books – Complete Books
- **Any IT related purchase including software and peripherals must be approved by IT.** Include the approval with your monthly expense report.
- If purchase is an exception to purchasing policy, obtain approval from Purchasing and include the approval with your monthly expense report



# PCard Reminders

- “Ship To” location must be a TTUHSC institutional address, if an exception, obtain approval from Purchasing and include the approval with your monthly expense report.
- Provide the Texas Sales and Use Tax Exemption Certification form to in-state vendors. Texas state sales tax is not an allowable expense on the PCard.
- PCard training and information is available at the [Purchasing Card](#) website.

# PCard Deviation Requests

Please send deviation requests to [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).

Please follow the steps below when sending a deviation request.

- Verify item(s) are not available to purchase through the punch-out.
- Provide vendor name.
- Provide item(s) requested deviation.
- Provide cost of item(s) and quantity to be ordered.
- Provide explanation why the deviation is necessary.
- Include approved deviation request with PCard documentation.

# Amazon Business Accounts

- **An optional method of shopping for goods and must adhere to purchasing policies and guidelines:**
  - Institutional contracts with vendors through TechBuy must be used first
  - If purchase is an exception to purchasing policy, you must obtain approval from Purchasing and include the approval with your monthly expense report
  - Any IT related purchase including software and peripherals must be approved by IT. Include the approval with your monthly expense report.
  - “Ship To” location should be to a TTUHSC institutional address, if there is an exception, you must obtain approval from Purchasing and include the approval with your monthly expense report
- **Benefits:**
  - Free two-day shipping on orders \$49 and over
  - Analysis Tools – monitor PCard spend with Amazon
  - Tax exemption honored for most vendors
  - Business pricing and quantity discounts

# Travel Reminders

- Uploading and attaching all travel documentation within the Travel2 system is the preferred method to submit both Travel Applications and Vouchers.
- Any travel voucher not approved by the Travel Office that is over 60 days old will be taxable to the traveler.
- The Travel System calculates based on the trip end date and will automatically report the taxable expense to Payroll. An email notification is sent to the traveler if this occurs.

# Travel Reminders

- Documentation requirements are located in the Travel Home page under “Help” in the left menu bar or access directly at [Travel Voucher Checklist](#).
- If you have questions, please contact us at [travel@ttuhsc.edu](mailto:travel@ttuhsc.edu).

# Questions & Answers

## Questions?