



# PURCHASING MADE EASY

*Presented by the Fiscal Services Training Department*



# Learning Outcomes

- Comply and adhere to State and university purchasing regulations
- Process orders using eVA procurement
- Purchase goods and services with P-Card and understand purchase limitations
- Correctly use Payment Request form

# University Policy 2106

- Purchase less than \$2,000

Delegated to  
Department  
Purchaser

Limited to Buyer in  
Purchasing

- Purchase \$2,000 or greater

# University Policy 2106

- Mandatory State contracts for certain purchase categories



SWaM

- Encouraged use of Small, Women and Minority owned businesses

# University Policy 2106

## Entering a **contractual agreement**

- Units may NOT sign contracts.
- Contracts are signed by Purchasing Department Staff
- Specific **signature authority** vested in President and Senior VP



# State Rules And Limitations

- All Mason-funded expenditures are subject to public scrutiny
- Expenditures must be considered essential to the operation of the University.





# Prohibited Purchases

- Gifts, flowers, cards, decorations (except for student clubs)
- Alcoholic beverages
- Snacks or coffee supplies for employees
- Items for employee parties or group luncheons
- Personal items



# Prohibited Purchases

- Subscriptions
  - except business related newspapers or magazines for one year only
- Books for classes (unless property of Mason)
- Picture framing (unless property of Mason)
- Framing award certificates
- Charitable contributions





# Student Clubs & Organizations

Funding from fees or self-generated revenue

- Events support student life
- Additional items allowed for events
  - Decorations (Flowers & Balloons)
  - Sound Equipment
  - Bands, DJs
  - Food & Refreshments



# Can I Purchase This?

*I am an employee in  
Fiscal Services*



*I am the Chess Club  
President*



# Purchasing Office

## Responsibilities

- Support university procurement
- Oversee contract administration
- Manage P-Card program
- Support eVA purchasing and problem resolution
- Provide assistance to department purchasers



# Purchasing Categories

**\$2,000 or more**

Unit Purchaser - starts with an eVA order (attach detailed info such as pictures, specs, etc).

Purchasing office Issue Purchase Orders to vendors



**\$2,000 up to \$5,000**

One quote

5 days lead time

# Purchasing Categories

\$5,000 up to \$50,000

Three quotes; 2  
SWaM (if available)

5-10 days lead time

\$50,000 and over

Invitation for Bids (IFB)

- Six sealed bids; 4 SWaM
- 30-45 days of lead time

Request for Proposal  
(RFP)

- Six sealed bids; 4 SWaM
- 30-180 days of lead time

# Splitting Orders Is Prohibited

## What Constitutes a “Split Order”

- Breaking down a single purchase into two or more purchases
- A single cardholder makes multiple purchases from the same vendor in a short period of time
- Two or more cardholders in a unit purchase from the same vendor in a short period of time
- Appearance of circumventing single purchase limit (\$2,000)



# Special Handling

- Professional Services
- Computer Equipment and Software
- Non-Competitive Exceptions
- Returns or Incorrect Receipts
- Special Approvals
  - Printing: Creative Services
  - Personnel Temps: Human Resources



# Online Vendors

When ordering from an online vendors such as Amazon.com every effort must be made to ensure the purchase does not include sales tax.

- Consult the Purchasing Made Easy manual for instructions: <http://fiscal.gmu.edu/wp-content/uploads/2013/09/pmmanual.pdf>
- Separate business and personal accounts for ALL purchases

# Special Approvals

- Foreign Vendors/Foreign Nationals

Must be reviewed by the International Tax Office before the order is issued. Includes honorarium payments, scholarships, fellowships, and travel reimbursements.

- Administrative System Applications

Must be reviewed by the Architecture Standards Review Board (ASRB) before purchase order is issued. <http://ati.gmu.edu/policy/asrb-review/>



# Contracts

- State Contracts
  - <http://www.dgs.state.va.us/>
- Scientific Contracts
- Other Contracts



Trusted

# Mandatory Supplier - Furniture

## Virginia Correctional Enterprise (VCE)

- State contract for all furniture needs
- Punch-out catalog in eVA system
- Purchases waived by VCE must be processed through Purchasing office



# Mandatory Supplier – Office Supplies

## The Supply Room Company (TSRC)

- All office supplies (offices and classrooms including printers)
- Mason forms, stationery and envelopes
- Punch-out catalog in eVA system
- Waiver (approved by Purchasing Buyer)





# Business Cards

## Worth Higgins

<http://ur.gmu.edu/creativeservices/businesscards/>

- Order online with P-Card
- No eVA order required from initiator
- Purchasing has issued an eVA blanket order to Worth Higgins



# Academic/Research Consulting

- eVA Purchase Requisition
- Proposal for Service
- Cost/Price Analysis for Contracted Services
- Employee/Contractor Evaluation
- Substitute W-9 Form (if Mason has never paid)
- Sole Source Procurement

## Approval Request

(if competition is impracticable  
or unavailable)



# Honorarium Payments

*An honorarium is a one time payment that is a token of appreciation paid to an individual who is not a Mason employee or student.*

- A **guest lecturer** distinguished in his/her field
- A **noted scholar** participating in a symposium
- A **minister or cleric** providing an invocation
- A distinguished **alumnus** invited to make brief remarks at the dedication of a new campus building

# Surplus Property

- **Part of Central Receiving**
  - Clearinghouse for excess/obsolete equipment
  - Items available at no charge to departments
  - Units must use Central Receiving for the processing of all surplus property
  - Central Receiving reports to the Director of Facilities Management
- **Location**
  - Warehouse is on Rivanna River Lane
  - Customer Service, 3-2525



# How Will I Purchase Goods?

Primary tool for purchasing goods and services is eVA – Virginia's electronic procurement system

- Payments processed with P-Card or Direct Billing (Accounts Payable)
- **Payment Request Form** – less preferable payment option when P-card and/or eVA is not accepted or available.



# Third Party Processors

Only allowable if the merchant will not accept a Mason P-Card or direct bill payment.

The following documents must be retained in your P-Card file and uploaded to Bank of America Works

- Screen shot of the vendors website showing the vendor only accepts PayPal (or other service)
- Itemized receipt issued by vendor
- E-mail from PayPal confirming the purchase

A third party processor may not be used for payments to individuals for services.



# Using The Payment Request Form

- Use Payment Request Form if:
  - Vendor will not accept a P-Card -or-
  - P-Card is not available
- **AND** request is for specified items:
  - Conference registration
  - Reimbursements
  - US Dept. of Homeland Security
  - US Postal Services
  - Other (pre-approval required)



Send to Accounts Payable, MS 3C1  
 Tel: 703.993.2580  
 Fax: 703.993.2589

# Payment Request

Use of this form is limited to payments that are one of the following types (check one):

Optional Tracking #: \_\_\_\_\_

- Reimbursements (excluding travel, food/beverage expenses)     
  Conference Registrations  
 Payments to US Dept of Homeland Security or US Postal Svc     
  Other (pre-approval required; see instructions)

### Payee Information:

Name: \_\_\_\_\_  
 (last, first, middle initial)

Address: \_\_\_\_\_  
 (number, street, apt)

\_\_\_\_\_  
 (city, state, zip code)

G number: \_\_\_\_\_  
*(If first-time payee: please attach completed [W-9 Form](#))*

### Contact Information:

Requestor: \_\_\_\_\_ Tel: \_\_\_\_\_

Department: \_\_\_\_\_ MS: \_\_\_\_\_

Date Submitted: \_\_\_\_\_ Date Required: \_\_\_\_\_

### Check All that Apply:

- Pick up at A/P Dept, Call Ext. \_\_\_\_\_  
 Mail to address shown (no attachments)  
 Mail with Attachment (copy attached)  
 Other: \_\_\_\_\_  
 \_\_\_\_\_

### Check One:

- U.S. citizen/lawful permanent resident  
 Nonimmigrant visa holder and activities conducted in the US (visa status) \_\_\_\_\_  
 (Send form to International Tax, MS 4B2)  
 Non-U.S. citizen OR Nonimmigrant visa holder and activities conducted outside the U.S. (Please ask payee to complete [Statement for Services Performed Outside the U.S.](#) Send this form and signed Statement to International Tax, MS 4B2.

<u>Nature of Expenses (Description)</u>	<u>Fund/Org</u>	<u>Account</u>	<u>Activity*</u>	<u>Amount</u>
*Activity code requires pre-approval.			<b>TOTAL</b>	<b>\$0.00</b>

**Signatures:** (Lines 1, 2, and 3 for reimbursements; Line 2 only for vendor payments)

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1. Signature of payee if Mason employee or student      Print Name                      Title                      Date

(Signature certifies that this is a necessary and appropriate expenditure that has not been nor will not be reimbursed by another party.  
Signature acknowledges that the goods purchased become the property of the University.)

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2. Signature of approving official for fund or org      Print Name                      Title                      Date

(Signature card must be on file in Accounts Payable. Signature certifies that this is a necessary and appropriate expenditure.)

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3. Signature of supervisor if Payee is approving      Print Name                      Title                      Date  
official for fund/org (**reimbursements only**)

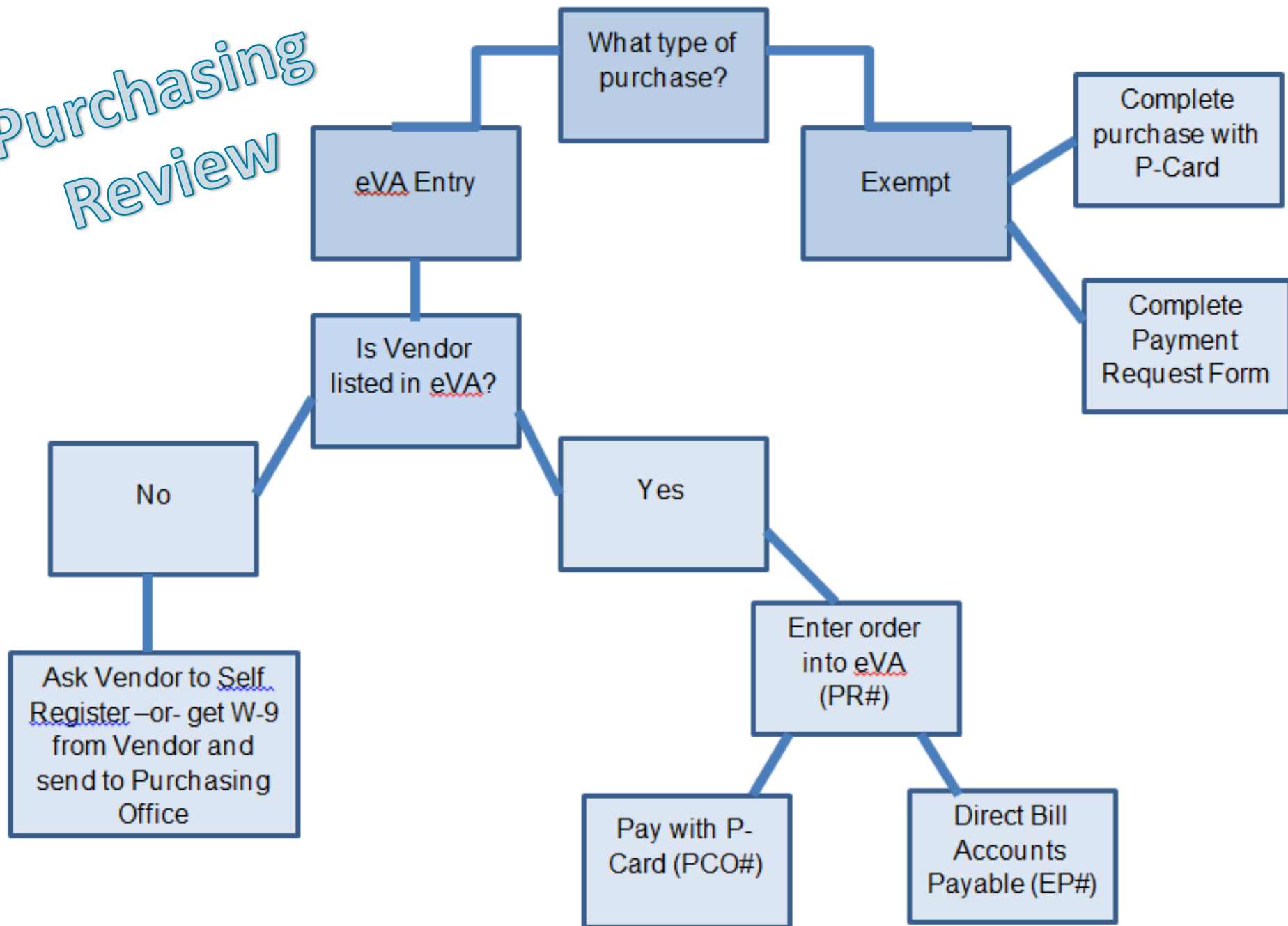
# Payment Request Form Reminders

- Employee reimbursement \$20 or less
- Conference registration
  - Date Required
  - Allow 10 working days
- No Virginia sales tax reimbursements
- Use correct account codes
- Keep a copy!

# Revenue Refund

- Use to request a check when revenue is to be refunded to an individual or organization
  - Revenue Refund Form
- Processed as an offset to the fund/org and revenue account originally credited
  - Additional instructions on Fiscal Services webpage: [fiscal.gmu.edu](http://fiscal.gmu.edu)

# Purchasing Review



# Resources And Contacts

## Purchasing and Accounts Payable (PH: 3-2580)

*Purchase Goods or Services*

<http://fiscal.gmu.edu/purchasing/purchase-goods-or-services/>

*Use a P-Card*

<http://fiscal.gmu.edu/purchasing/use-a-p-card/>

## Fiscal Training (PH: 3-2089)

<http://fiscal.gmu.edu/training/obtain-training-materials/>

