

PURCHASING HIGHLIGHTS

May 20, 2021



AGENDA

- Methods of Procurement
- Purchases Under \$5k
- PPE Supplies
- Consolidated Services
- ERC Maintenance Contract
- Strategic Sourcing
- Closing FY20-21 PO's
- Fiscal Year Cutover
- Blanket PO's for FY21-22
- Purchase Order Roll to FY21-22

METHODS OF PROCUREMENT – SC LAW

SECTION 11-35-1510. Methods of source selection.

Unless otherwise provided by law, all state contracts **must be awarded** by competitive sealed bidding, pursuant to Section 11-35-1520, except as provided in:

- (3) Section 11-35-1525 (Fixed Priced Bidding);
- (4) Section 11-35-1528 (Competitive Best Value Bidding);
- (5) Section 11-35-1529 (Competitive Online Bidding);
- (6) Section 11-35-1530 (Competitive Sealed Proposals);
- (8) Section 11-35-1540 (Negotiations After Unsuccessful Competitive Sealed Bidding);
- (9) Section 11-35-1550 (Small Purchases);
- (10) Section 11-35-1560 (Sole Source Procurements);
- (11) Section 11-35-1570 (Emergency Procurements);

METHODS OF PROCUREMENT – SC LAW

SECTION 11-35-1525. Competitive fixed price bidding.

(1) Conditions for Use. When the procurement officer determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive fixed price bidding subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided for in this section.

SECTION 11-35-1528. Competitive best value bidding.

(1) Conditions for Use. When the procurement officer determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive best value bidding subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided for in this section.

SECTION 11-35-1529. Competitive online bidding.

(1) Conditions for Use. When the procurement officer determines in writing that on-line bidding is more advantageous than competitive sealed bidding, a contract may be entered into by competitive on-line bidding, subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided in this section.

SECTION 11-35-1530. Competitive sealed proposals.

(1) Conditions for Use.

(a) If the procurement officer determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive sealed proposals subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided in this section.



METHODS OF PROCUREMENT – SMALL PURCHASES

11-35-1550(2)

(a) No Competition – not exceeding \$10,000.00

- ✓ Price is fair and reasonable

(b) Three Written Quotes - \$10,000.01 - \$25,000.00

- ✓ Provided by the requester
- ✓ Must include solicitation and responses

(c) Advertised Small Purchase – Not in excess of \$100,000.00

- ✓ Performed by Purchasing

PURCHASES UNDER \$5K

It is strongly encouraged to utilize the university purchasing card for all transactions with a total value up to \$4,999.99 (applicable fees, sales/use tax, shipping, etc.).

This includes:

- Operational or Educational Supplies, not provided for by mandatory state contract
- Select contractual services, such as repairs
- Memberships / Fees / Dues
- Information technology (computers, toner cartridges, e-Devices, and cellular services);

NOTE: Dell punchout should be reserved for purchases exceeding a single transaction limit of \$4,999.99.

PPE SUPPLIES

- Departments are still encouraged to order PPE Supplies through Consolidated Services.
- Schedule pick-up or request delivery when Consolidated staff is available.
- Order Form [link](#) on Purchasing's website
- Email: PURCOVID@mailbox.sc.edu
- Phone: (803) 777-2156

CONSOLIDATED SERVICES

When it is time to turn in equipment, furniture, etc.

- Use Inventory Form 7 (available in the Purchasing Toolbox)
- Call for an appointment: (803)777-2156
- Closed for Inventory: **June 28th-30th**

HARDWARE MAINTENANCE CONTRACT

Electronic Risks Consultants, Inc. – State Contract #4400023058

Contact: Bob Tolomeo

Phone: (866) 372-7283

Email: rtolomeo@erc-corp.com

Service shall include all expenses in accordance with the maintenance service agreement or quote, to include, but not be limited to, labor, parts, supplies for corrective and preventative maintenance, and applicable consumable parts as recommended by the manufacturer.

Excludes damages caused by power surges, environmental conditions and changes (i.e. air conditioning failures), human error, negligence, force majeure.

STRATEGIC SOURCING

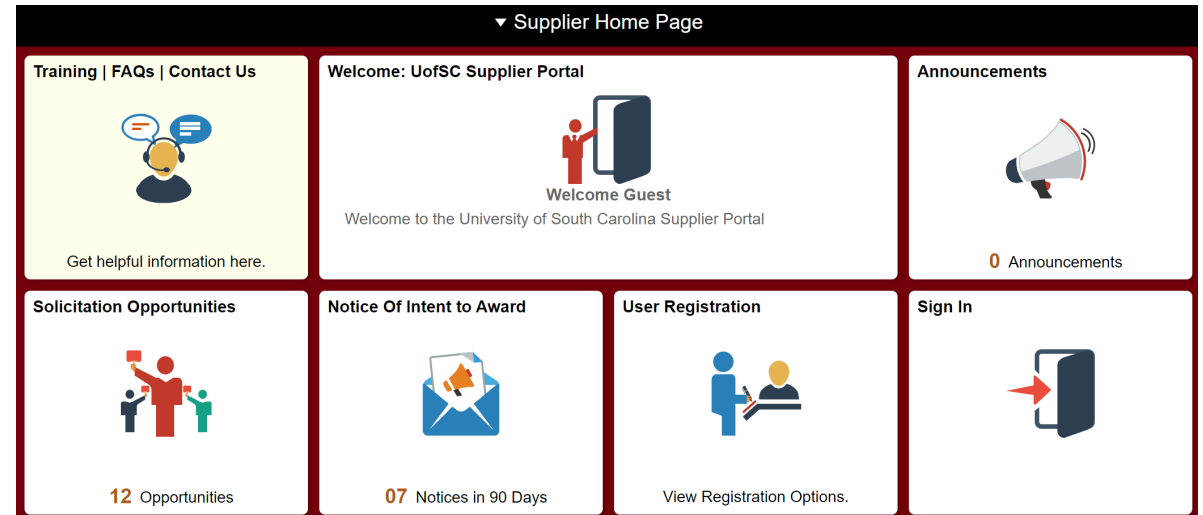
UofSC went live with a new online bidding module in PeopleSoft on March 15th which allows suppliers the opportunity to submit online sealed bids in lieu of mailing their hardcopy offers to the Purchasing Office.

- “Strategic Sourcing” essentially means to *strategically* (competitively) solicit online offers (bids/proposals) from qualified *sources* of supply.
- When a requisition is submitted using the TO BE BID supplier, this alerts Purchasing that strategic sourcing is needed.
- An e-mail is sent to the requisitioner notifying them of the buyer assigned to their solicitation.
- An “Event” is created by the buyer, which the requisition lines are copied into.
- After the Event is analyzed and awarded to a supplier/offeror, a Procurement Contract and/or Purchase Order is generated in PeopleSoft.

STRATEGIC SOURCING

The Purchasing website has an overview for both university and vendor communities which includes:

- Important Information for UofSC Employees
- Announcement of the New Online Solicitation System
- Supplier Portal link <https://supplier.ps.sc.edu/>



➔ Training resources to assist new Offerors and current Suppliers with the Supplier Portal and UofSC's Solicitation Opportunities will be available in the **New Solicitation System** section of our **Purchasing Toolbox**.

[Offeror Registration](#) - This guide outlines the process for prospective suppliers to become "Offerors" in the UofSC solicitation system.

[Supplier ID Request](#) - This guide outlines the necessary steps for a current UofSC Supplier to request a User ID using the UofSC Solicitation System.

STRATEGIC SOURCING

A new query was added to two pages to assist users in finding Event numbers and buyers that were assigned to requisitions.

- On the Manage Requisitions page, right-click on the Requisition ID field, then click the Event Req XREF query.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text" value="USC01"/>	Requisition Name	<input type="text"/>
Requisition ID	<input type="text" value="1000058819"/>	Request State	<input type="text" value="All but Complete"/>
Date From	<input type="text"/>	Date To	<input type="text" value="05/19/2021"/>
Requester	<input type="text"/>	Entered By	<input type="text"/>
		Budget Status	<input type="text"/>
		PO ID	<input type="text"/>

Related Information

- Event Req XREF

STRATEGIC SOURCING

- On the Requisition Details page, find the Event Req XREF query in the Related Content link.

UNIVERSITY OF SOUTH CAROLINA

All Search >> Advanced Search Last Search Results

Related Content |

Event Req XREF

Requisition Details

[Requisition Summary](#)

Business Unit	USC01	Requisition Name	QS-1 Q-Stress ECG
Date	03/10/2021	Requisition ID	1000058819 FAMIS Work Order
Request State	PO(s) Dispatched	Total Amount	25,100.00 USD
Requested For		Pre-Encumbrance Balance	5744.01 USD

Approval Justification
SOLICITATION

STRATEGIC SOURCING

- The Related Content section will open at the bottom of the page.
- The Requisition ID will populate into the query from Manage Requisitions if there was already a number entered in that field.
- It will also populate from the Requisitions Details page.
- Click the View Results button to see which Event ID the Requisition ID is associated to, as well as the Event Buyer's name and email address.

▼ **Related Content**

Event Req XREF

SC_SS_EVENT_REQ_XREF_RC - Event/Req Cross Reference

Requisition ID

Event ID

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

First 1-2 of 2 Last

Row	Requisition ID	Requisition Line	Event ID	Event Line	Buyer Name	Buyer Email
1	1000058819		1 210001		1 Tammy Cash	tmcash@uscupstate.edu
2	1000058819		2 210001		2 Tammy Cash	tmcash@uscupstate.edu

CLOSING FY20-21 PO's

- Continue sending close PO requests to purchasing@sc.edu.
- If a PO is fully matched and has a \$0 encumbrance, it will be closed, no need to send a request to close.
- Only send requests to close a PO if all invoices have been paid, and no more invoices are expected.
- Closed PO's with remaining funds will be released to the general ledger.
- PO's that are not closed and still have an encumbrance balance will be rolled into the new fiscal year.
- Use PO Inquiry to review PO information: *Purchasing > Purchase Orders > Review PO Information > Purchase Orders*

FISCAL YEAR CUTOVER

- **June 18th** @ 12 PM - Requisition period for FY20-21 closes.
- **June 21st** - You may begin entering FY21-22 Requisitions.
- After the fiscal year PO Roll processes are performed, all FY20-21 requisitions will have a status of “complete” meaning they are closed and can no longer be modified.

BLANKET PO's FOR FY21-22

- Blanket Purchase Orders are a simplified method of filling repetitive needs for small quantities of miscellaneous supplies, services or information technology and are designed to reduce administrative costs associated with small purchases by eliminating the need for issuing individual payment requests or purchase orders.
- Blanket Purchase Orders are valid for one year and are closed each fiscal year.
 - ❖ A one-year service agreement is not a blanket order.
 - ❖ An annual software license is not a blanket order.
- FY21-22 Blanket Orders are allowed on or after **June 1st**.
 - ❖ These Requisitions must have line descriptions indicating they are **FY21-22** blanket orders, as well as the authorized users of the PO.
- FY20-21 Blanket Orders will close the last week of July allowing for June invoices to process.

PURCHASE ORDER ROLL TO FY21-22

All Purchase Orders from FY20-21 will be rolled into FY21-22 on **Thursday, July 15, 2021**. This means:

- All remaining PO encumbrances for FY20-21 will be liquidated and carried forward into FY21-22.
- All requisition lines that were created in FY20-21 will no longer be linked to their corresponding PO lines. The consequences of this is that **change requests** for these line items will not be possible. At that point only new requisition lines can be created and manually added to existing PO's.

UPCOMING REQUISTIONER TRAINING

[Finance PeopleSoft Training Schedule](#)

- July 7th @ 9-11 AM
- August 4th @ 9-11 AM
- September 8th @ 9-11 AM
- October 6th @ 9-11 AM
- November 3rd @ 9-11 AM
- December 8th @ 9-11 AM

If extra sessions are needed, we will add more dates to the calendar.

THANK YOU!

If you have additional questions, please
send an email to purchasing@sc.edu