



UPPWords

News from University Procurement Professionals

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Fiscal Year 2010 Year-End Closing Instructions

PURCHASING PROCEDURES AND DEADLINES

Following you will find a tentative schedule for fiscal year 2010 year end procedures. We continue to review these procedures in conjunction with Accounting, Grants Accounting and Budget offices; and if changes are identified, we will provide that information as soon as possible.

April 23 *State General Funds* - All purchase requisitions must be processed and approved in SDezBuy no later than **April 23, 2010**. Requisitions processed after this date must be processed against FY11 funds. Purchase orders issued with FY10 funds will be carried over into FY11 (provided budgeted funds are available) if they have not been paid in June.

May 21 *University Budgeted Funds* - (tuition, central grants overhead, university support fees, general activity fees, central administration other and delivery fees). All requisitions must be processed and approved in SDezBuy no later than **May 21, 2010**. Requisitions processed after this date must be processed against FY11 funds. Requisitions and purchase orders processed by this date but remaining as an open encumbrance (e.g. the item has not yet been received) on June 29, will be carried over into FY11 provided budgeted funds are available.

Formal Bid Process - If the item(s) being ordered have to be bid by the Office of Procurement Management (OPM), the bid letting must open before **June 1, 2010**. Equipment and supply purchases (except computer hardware/software and scientific lab equipment/supplies) in excess of \$10,000 require bidding by (OPM). If you anticipate ordering equipment or supplies that require bidding by OPM, please contact the Purchasing Office (677-5667) to determine the date in which the requisition will be due as it may be earlier than the dates noted above.

Grant Funds - Requisitions processed against grant funds will follow the deadlines established for the grant. Please contact Grants Accounting if you are unsure of the expiration dates.

May 28 *Encumbrance Closures/Adjustments* – All requests for making adjustments to existing purchase orders including closing encumbrances, should be sent to Purchasing by **May 28, 2010**.

June 4 *Receiving State Funded Orders* – All purchase orders using state funds must be received in by **June 4, 2010**.

June 22 *Receiving University Funded Orders* – All purchase orders using university budgeted funds must be received in by **June 22, 2010**.

Receiving Process - Receiving should be done as soon as the goods or services have been received. However, items that have been physically received in June and you are processing the receiving document in Banner in July, the receiving date of **June 29, 2010** must be used.

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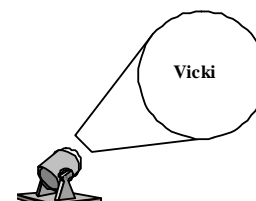
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UPP Member Spotlight!



Vicki Soren, Purchasing Director South Dakota State University

Vicki Soren is the Purchasing Director at South Dakota State University. Vicki has worked at SDSU for 25+ years with 22 of it in the Purchasing area. She is the shared buyer for printing, promotional items, copiers/office machines and library/museum equipment/supplies for SDBOR along with processing all orders for SDSU with a staff of two. She also supervises the Stores operation at SDSU and is the Risk Management liaison between the State Risk Management office and SDSU.

Vicki's husband is a farmer and they raise grains, Maine Anjou cows and Katahdin sheep in the Lake Preston area. She has two grown sons – one is the SDSU Bookstore Textbook Manager and the other is entering the Air Force in April. In her free time Vicki enjoys spending time with her family, gardening, cooking (and eating), sewing and doing cross-stitch.

Board of Regents Revised Capital Asset Approval Limits

by Kyra Blatchford, USD

On December 22, 2009, the Board of Regents approved a change to BOR Policy 5:4 related to the approval process for equipment purchased with externally funded research funds. The following policy became effective immediately:

- Equipment with a unit cost of \$250,000 or less no longer requires approval from the BOR.
- Equipment with a unit cost of \$250,000 - \$500,000 requires approval from the Executive Director.
- Any item with a unit cost exceeding \$500,000 requires approval from the Full Board.

Externally funded research is defined as any funds restricted by the funding source for a specific purpose, from a source other than South Dakota state government of Board approved fees. When you are ordering research based equipment that falls within the realm of this change, please be sure to mark any requests as 'RESEARCH' in the internal notes on the requisition.

Equipment requiring Full Board approval must be submitted to the Purchasing Office according to the following dates: by April 16th for the May 13-14 meeting; by May 28th for the June 24-25 meeting; and by July 15th for the August 11-13 meeting.

BOR also updated this policy for all other capital asset purchases regardless of funding source at the April meeting. Effective immediately, the Executive Director shall review and approve ALL purchases with a per unit cost of \$250,000 to \$500,000.

Board approval is required of any capital asset purchase over \$500,000. The established purchase form shall be completed for all capital asset purchases with a per unit cost of \$250,000 or more. A copy of the requisition and backup information shall be attached and sent to the Board Office for the necessary approval.

Please keep in mind regardless if it needs capital asset approval or not it may need to go out for bid through the purchasing office or OPM depending on the type of funding and what is being purchased.

If you would like to view the policy, please go to the following site:
http://www.sdbor.edu/policy/5_FinanceBusiness/documents/5-4.pdf

IT Approvers Now Reviewing AV Orders at Several Campuses
by Linda Van De Rostyne, USD

All orders using a commodity code related to Information Technology (IT) equipment – those in the 38100-39500 range (with the exception of 39400 Computer Supplies) - have routing through an IT approver when the total of the order is over \$500.00.

Recently, UPP received a request from several of the campus IT directors to include the commodity code 13000 Audio/Video/Photographic Equipment in the list for ITS to review. The ITS Departments at DSU, NSU, SDSU and USD will review your Audio/Video/Photographic Equipment orders prior to routing to the purchasing step in the workflow. In addition, NSU has opted to include the commodity code 13500 Audio/Video/Photographic Supplies for ITS review. This step will help the ITS departments maintain the necessary standards that are needed on their respective campuses.

Please allow additional processing time for this commodity and reflect that in your delivery date on the requisition. Please note: this change affects only DSU, NSU, SDSU and USD at this time. Thank you.

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SPRING!
Has
finally
arrived!

Delivery Date Move on the PO Form
by Linda Van De Rostyne, USD

A change has been made to the purchase order form. The **Delivery Date** on the purchase order form has been moved. Suppliers were not noticing the Delivery Date which appeared below the catalog number field on the purchase order and were providing the product outside the expected timeframe requested by the user.

UPP has moved the Delivery Date to the **Vendor Shipping Instructions** quadrant of the purchase order form where it will be more visible to the supplier and user. If the user selects, **View/edit by line item...** to signify that there is a different delivery date for each line or for certain lines on the purchase order, that option is still available.

Placement of the Delivery Date at the header

<p align="center">Quote / Contract #</p> <p>Quote / Contract # WSCA/NASPO 15704 - quote 4651474</p>		<p>PURCHASING BUYER CONTACT:</p> <p>Buyer Email linda.vanderostyne@usd.edu Buyer Name USD/Linda Van De Rostyne Buyer Phone 605-677-5503</p>	
<p align="center">Vendor Shipping Instructions</p> <p>Note(s) to Vendor: HP Reseller OID # 6496460001 - RTI, Big Deal 84424960; WSCA/NASPO 15704</p> <p>Delivery Date 3/5/2010</p> <p>Terms and Conditions: PO template pg 2 - Itemized packing slip must accompany all shipments.pdf (67k)</p> <p>Freight Terms: FOB Destination-Prepaid/Allowed</p> <p>****THE PURCHASE ORDER NUMBER MUST APPEAR ON ALL PACKAGES, INVOICES AND CORRESPONDENCE****ALSO, Please include the full shipping address as referenced on the purchase order on all shipping labels, packing slips and invoices.</p>		<p align="center">Bill To / Invoice Inquiries</p> <p>Billing Address: Contact for invoice related questions</p> <p>Ph: 605-688-6275 Fax: 605-688-5014</p> <p>South Dakota Board of Regents Accounts Payable Center PO Box 2201 Brookings, SD 57007-2798 United States</p>	

Placement of multiple Delivery Dates at the line level

Line No.	Product Description	Catalog No.	UOM / Packaging	Unit Price	Quantity	Ext. Price
1 of 2	Sewing Machine, with 30 stitches	19037-89310	1/EA	699.00 USD	1 EA	699.00 USD
	<p align="center">ADDITIONAL INFO</p> <p>Delivery Date 3/16/2010</p>					
2 of 2	Surger - sewing Machine - with metal plates	1356987	1/EA	1,298.65 USD	1 EA	1,298.65 USD
	<p align="center">ADDITIONAL INFO</p> <p>Delivery Date 3/1/2010</p>					