



***Procurement Services***  
*Promoting Excellence, Delivering Service*

Procurement 101  
OSP Summer Training  
July 17, 2024

# Procurement Services: Procurement Card Purchases

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- \*WKU Procurement Card program is designed for small dollar purchases of \$2,000 or less and is the main method of payment for travel.
- \*University-negotiated price contracts must be utilized. Contact Purchasing for contract information or questions.
- \*A signed and approved user agreement must be on file with the record keeper before an employee can use a pro-card.
- \*The pro-card is for purchases using state funds only. Foundation purchases are not allowed.

# Procurement Services: Procurement Card Purchases

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- \*Make sure to use the WKU KY tax exemption certificate when making a purchase in-state. Contact Purchasing for other states' certificates or questions.
- \*An itemized receipt or invoice must be obtained for each purchase.
- \*Contact the pro-card office immediately if a card is lost/stolen.

**Intentional misuse/abuse or fraudulent use may result in disciplinary action up to and including dismissal.**

# Procurement Services: Procurement Card Purchases

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Pro-card Limits:

Monthly Credit Limit - \$5,000

Single Transaction Limit - \$2,000

100 transactions are allowed each month

15 transactions are allowed each day

Merchant Category Codes (MCC)— Codes which describe the type of products or services offered by the supplier.

**Temporary Limit or MCC changes can be requested via the Account Maintenance Form.**

# Procurement Services: Procurement Card Purchases

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## Types of Declines:

1. One of the 4 Limits has been reached.
2. The supplier's MCC is blocked.
3. Card information is incorrect.

### Examples:

- \*expiration date
  - \*CVV code
  - \*16-digit number or address – no decline because electronic information isn't being sent
4. Merchant website or card machine isn't working.
  5. Visa has placed a temporary hold on the card.

# Procurement Services: Procurement Card Communications

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PaymentNet Messages – left side of screen

1 of 2 Messages

January 10, 2024

Pcard Quick Note: December Transactions Monthly Download File

I will pull the December transactions file for the monthly download on the morning of Tuesday, January 16th.

**Please have ALL December transactions reconciled by 8AM on Tuesday, January 16th.**

Thanks.

Pam

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# Procurement Services: Procurement Card

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Questions

# Procurement Services: TopShop

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e-Procurement system benefits:

- \* Requisitions/POs
- \* Pro-card purchases
- \* Contract information
- \* RFPs/Bids/Quotes
- \* Suppliers including Guided Buying
- \* Procurement Communications to campus
- \* Vendor invoicing
- \* Receiving
- \* Reporting



# Procurement Services: TopShop

## TopShop Community Message

The screenshot displays the WKU TopShop Marketplace interface. A central "Community Message" modal is open, containing the following text:

**WKU's TopShop**

**\*NOTICE - All Personal Service contracts currently effective will expire 6/30/24. These will need to be revised because of the new biennium. Please contact Brittney Green if you have questions or concerns.**

Open POs: Please review all of your open POs and let the purchasing agent know if any need to be closed. Fiscal year end is quickly approaching.

**NEW PURCHASING INSTRUCTIONS FOR APPLE:** Apple now has a punch-out in Topshop, you can access these new instructions at the link below or under "Quick Links"  
<https://www.wku.edu/its/wku-computer-purchasing/>

Mark as read

Close

The background interface includes a navigation sidebar with "Marketplace Home", "Purchasing", "Lists", "Orders", and "Transactions". The main content area features "Guided Buying" categories like "Moving/Relocations", "Furniture", "Scientific", and "Appliance". A "QUICKLINKS" section lists various resources such as "Purchasing Agents and Associated Commodities", "Need Help?", "WKU - Purchasing", "Computer Buying Instructions", "FAQ's and Other TopShop Information", "Approved Promotional Vendors", "TopShop Access and Training", "Single Source/Sole Source Justification Form", "GASB-96 Reporting Form", and "Business & Finance Policies". Supplier cards for 4imprint, ANIXIER, Apple, B&H, and BIO-RAD are visible at the bottom.

# Procurement Services: Contract Vendors

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Purchasing has established contracts for specific commodities based on the best value for the University.

The contracts must be utilized when purchasing these commodities.

## Examples:

Promotional Supplies – (see next slide for supplier information)

Office Supplies – Staples Business Advantage (catalog in TopShop)

Car Rental – Enterprise/National

# Procurement Services: Contract Vendors

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Contracts are awarded as a result of competitive bids or negotiations either by university procurement professionals, purchasing cooperatives, or government contracts and are based on best value.

Best Value includes price, item quality, customer service, and delivery.

**Not all suppliers listed in TopShop are contract vendors!**

# Procurement Services: RFPs/Bids/Quotes

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Purchasing Thresholds:

\$20,000-\$39,999 – 3 quotes are required, can be done as a bid

Bids often result in a price contract for specific commodity or service. More than one supplier may be awarded the contract. An established price contract will eliminate the need of requesting quotes or bids each time an item is purchased.

# Procurement Services: Quotes/Bids/RFPs

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Purchasing Thresholds:

\$40,000 + requires RFP

State purchasing law KRS 45A establishes this standard and process.

Often more flexibility with RFP though negotiation of products, services, costs, etc.

# Procurement Services: Contract Vendors – Guided Buying in TopShop

The screenshot displays the WKU TopShop Marketplace interface. At the top, there is a red navigation bar with the WKU logo, the text "Marketplace WKU TOPSHOP", a search bar containing "All Search Products or Suppliers", and user profile icons. On the left side, a vertical sidebar lists navigation options: Marketplace, Purchasing, Lists, Orders, and Transactions. The main content area is titled "Marketplace Home" and "WKU's TopShop", with a "Create" button. Below this, the "Guided Buying" section features a grid of category tiles, each with a red heart icon and a category name: Moving/Relocations, Scientific and Laboratory Supp..., Graphic Design, Beverages, Computers And Accesories, Contracted, Furniture, Appliances, Mowers and Lawn Equipment, Office Supplies, and Promotional Items.

Marketplace WKU TOPSHOP

All Search Products or Suppliers

Marketplace Home

WKU's TopShop

Create

Guided Buying

- Moving/Relocations
- Scientific and Laboratory Supp...
- Graphic Design
- Beverages
- Computers And Accesories
- Contracted
- Furniture
- Appliances
- Mowers and Lawn Equipment
- Office Supplies
- Promotional Items

# Procurement Services: Personal Services

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**DEFINITION:** A personal service contract is an agreement whereby an individual, firm, partnership, or corporation is to perform certain services requiring professional skill or professional judgment for a specified period of time at an agreed upon price.

Examples: architect/engineer, consulting services, web/graphic design, medical personnel, executive search firm, etc.

**POLICY:** The University's policy governing personal service contracts is established by state law in the Kentucky Revised Statutes (KRS 45A.690 to 45A.725).

# Procurement Services:

## Personal Services – Important Requirements

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- Each contract must include a thirty (30) day cancellation clause.
- Contracts are reported for review to the Government Contract Review Committee (GCRC) of the Kentucky state legislature.
- The GCRC meets on the second Tuesday of the month in Frankfort.
- Contracts must be submitted to the Purchasing Department by the 15<sup>th</sup> of the month prior to the desired effective date of the contract. (example: for an April 1<sup>st</sup> effective date, all PSC documents must be submitted to Purchasing by March 15<sup>th</sup>.)
- Out of state firms must be registered as a foreign corporation with the Kentucky Secretary of State.



# Procurement Services: Personal Services

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All Personal Services contracts:

\*Requires approval from President of the University and final signature of the Asst. VP of Business Services

\*Contractors may not commence work until the contract is approved by the Government Contract Review Committee (GCRC).

\*Require a Proof of Necessity form signed by the requesting department.

# Procurement Services: Personal Services

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If you are unsure if you need a Personal Service Contract, contact Purchasing prior to engaging in any services.

Contract forms for initiating a contract or changes to an existing contract can be found: <https://www.wku.edu/strategyopfin/forms/>

# Procurement Services

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Questions

# Procurement Services: Single/Sole Source

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**Sole Source** – ***Only*** known source for unique products & services with no other supplier options available.

**Single Source** – Circumstances dictate use of a specific supplier despite other potential options (i.e. availability, timeliness, locality, etc.).

Price is not a consideration in support of a sole source decision. Procurement Services may negotiate various terms and pricing if appropriate.

The **Single Source/Sole Source Justification Form** must be completed and submitted with the requisition along with any other supporting documentation.

The form can be found in the Learning Center on the TopShop Marketplace Home screen.

# Procurement Services: GASB 96

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Governmental Accounting Standards Board (GASB) 96 – guidelines for accounting of subscription-based information technology arrangements (SBITAs).

The GASB 96 form must be completed and attached to either the requisition or pro-card account maintenance form for software purchase.

*This accounting process will continue indefinitely.*

The GASB96 form can be found in the Learning Center of the TopShop Marketplace Home screen.

# Business Services: Shipping/Receiving

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## Desktop Delivery

Moving toward Phase 3 but currently no timeframe.

**Physical Address** – FedEx and UPS are using the actual physical address for university buildings.

**University Address & Mail Stop Numbers** – USPS uses this address and does not recognize the physical building addresses as the official university address.

\*If you know a vendor will ship items USPS please use the University Address and your corresponding mail stop number.

# Business Services: Shipping/Receiving

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## Desktop Delivery

- \*Shipping & Receiving is the default address for delivery of goods.
- \*Consider when you will be out of the office such as vacation, summer hours, etc.
- \*Items are to be shipped to on-campus locations.

# Procurement Services

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Questions