



Submitting Equipment Trust Fund (ETF) Requisitions to Procurement

The Office of Budget and Financial Planning provided in its December 20th memo to participating departments instructions for completing requisitions for Equipment Trust Fund (ETF) Phase 30 (FY17) equipment orders for submission to Procurement for processing. These ETF requisitions are also called SCHEV (State Council of Higher Education for Virginia) requisitions.

The following are helpful hints to be sure SCHEV/ETF requisitions are processed timely.

The Procurement Department processes HokieMart requisitions for approved ETF equipment using the same procurement procedures for competition and acquisition as all other non-ETF equipment.

Early submission of HokieMart ETF equipment requisitions allows for the time needed to adequately compete, award, order and receive the equipment under the FY17 ETF deadlines.

Requisitions for approved ETF equipment should be completed and submitted through HokieMart using the same data entry protocol as any other non-ETF requisition while incorporating the additional information required as outlined in Attachment B on the December 20, 2016 memo from Budget and Financial Planning.

A single functional system must cost at least \$500.00. Individual components of a single functional system may cost less than \$500.00, but the aggregate cost of the single functional system must be at least \$500.00.

Individual components of a single functional system should be listed as individual line items on the same

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requisition and should be submitted consistent with how the vendor requires the system to be ordered. Doing so will also guarantee the requisition will match the vendor's invoice and will help with accurate receiving of the equipment.

Items aggregated together so the group of items costs over \$500.00 do not represent a single functional system. As an example, an order of (15) \$100.00 keyboards is not considered a single functional system.

Freight charges and installation charges can only be reimbursed through the ETF program if they are included on the same invoice as the equipment. It is acceptable for these two items to be their own separate line items on the same purchase requisition.

Please call the HokieMart help line (1-2020) for additional help with completing ETF requisitions to ensure expediency in processing the orders.

After-the-Fact or Confirming Purchases: What They Are and How to Avoid Them

An After-the-Fact or Confirming purchase typically occurs when an organizational unit makes a purchase for more than \$2,000 before VT Procurement issues a purchase order. For example, if you submit a requisition for over \$2,000 in HokieMart, and then you authorize the supplier to begin work before VT Procurement issues the PO, that is an After-The-Fact purchase.

Note that:

- It doesn't matter if the requisition is for goods or services.
- It doesn't matter if the requisition is for one item over \$2,000 or multiple items totaling over \$2,000.
- It doesn't matter if the cost without shipping is \$2,000 or less. Shipping charges must be included in the calculation.
- Direct Pay Procedures cannot be substituted to pay an After-The-Fact or Confirming Purchase

Why is an After-The-Fact/Confirming Order a Bad Thing?

After-the-Fact (Confirming) purchases result in delayed payments to suppliers who have, in good faith, provided goods or services to the University. They undermine the strong working relationships that VT strives to create and sustain with its supplier partners.

How do you avoid After-The-Fact Confirming Orders?

- Make sure everyone in your organizational unit understands that purchases should only be made after a purchase order is issued by the university.
- Be clear that only the designated individuals may initiate purchases on behalf of the unit.

Year End Purchases – It Is Not Too Early To Start Planning And Ordering!

It is not too early to be planning for and making purchases to receive goods and services by the year end fiscal cut-off. Long lead-time and backordered items are routine this time of year, but the earlier the purchases are ordered, the greater likelihood the items will be received in time to be paid with FY17 budget.



14th Annual New Developments in Laboratory Technology Vendor Exhibition

Faculty/Staff Registration for the 14th Annual New Developments in Laboratory Technology Vendor Exhibition is now open.

The fair is to be held on Wednesday, April 5, 2017 in Cassell Coliseum. Registration sign in opens at 9:30, and the event starts at 10:00.

Lunch is available for pre-registered attendees.

Register today:

<http://www.procurement.vt.edu/LabTechnologyVendorExhibition.html>

Catering Service, Business Meals and the Purchase of Food Items

Obtaining Approval

Public funds may be used in certain situations to purchase business meals, food for catered meals and individual food and beverage items. For full guidance on this subject, please refer to the following link:

https://controller.vt.edu/content/dam/controller_vt_edu/Procedures/AccountsPayable/20310a.pdf.

Please note that there are cost and commodity restrictions. For this reason, obtaining preapproval from the Controller's Office is strongly recommended. Further, it is the responsibility of the departments to maintain records of the event. This should include a description of the nature of the event, itemized receipts, Controller's Office preapproval and the list of attendees.

Procurement Procedures

Food items: Prepared food items are normally obtained from retailers and grocery stores and fall under the \$2,000/transaction delegation limit. It is preferable to use a Purchase Order if the supplier will accept it. It may be necessary to use a P-card with some grocery stores. P-cards cannot be used at restaurants. Itemized receipts and guest lists must be maintained in departmental files when a P-card is used.

Catering Services: On-campus events may be catered by the Personal Touch Division of Dining Services or the Inn at Virginia Tech and Skelton Conference Center (refer to University Policy 3006, <https://www.policies.vt.edu/3006.pdf>). These two Purchase Orders (POs) can be completed through an Interdepartmental Service Request (ISR) form via HokieMart and paid by funds transfer. For additional information, contact catering@vt.edu.

Commercial caterers can be used at values up to \$5,000 without competition. When making

arrangements for catering, you are encouraged to obtain several quotes from local caterers who appear qualified to support the event. Use of certified small, woman-owned and minority-owned businesses (SWaM) is encouraged and will help support university goals. If there is a contract to be signed, it must be reviewed and approved by the Legal Office prior to signing. Finally, if your organization uses catering services frequently, an effort should be made to rotate the business between firms so that no one firm obtains the bulk of our business. Guidance regarding specific rates, rules and documentation regarding catering can be found at the following link: https://controller.vt.edu/content/dam/controller_vt_edu/Procedures/Travel/20335c.pdf. Invoices may be processed via HokieMart as a Direct Pay category F1.

The department should gain written approval from the Manager of Accounts Payable or an Accounts Payable Supervisor in the Controller's Office prior to purchasing food on state funds. Approval may be obtained by submitting a memo or email describing the event for which food is being requested. The request should include a description of the event, beginning and end time of the event, location and attendees designated as faculty, staff or guests.

What can go wrong?

1. You can fail to obtain preapproval from the Controller's Office, and the event can be determined not to meet the guidelines for the use of state funds, or you can exceed the guidelines for meal allowance.
2. There can be alcohol included in the invoice that is always ineligible for state funds.
3. Your final bill can exceed \$5,000, and you did not obtain competition.

In any of these situations, private funds will need to be used to cover at least a portion of the invoice.

Assistance Contacts:

Procurement: Trisha Wilson wilsont@vt.edu, 1-7402

Contract Corner

The Contract Corner is used to provide new/additional information on Contract Issues.

Procurement Department Buyers are always available to assist if you have any questions.



BioExpress Corporation Has been Acquired by VWR International, LLC

BioExpress Corporation has been acquired by VWR International, LLC. All products or their equivalents can be obtained through the VWR punchout catalog.

For more information, please contact Marleigh Durham, VWR Sales Associate, 540-556-2812, Marleigh_Durham@vwr.com.

The hosted catalog and the vendor BioExpress is no longer accessible for shopping in HokieMart.

Purchasing Delegation Increases When Using Contracted Vendors

When purchasing items from a contract vendor, with limited exceptions in commodity areas, a requisitioner's purchasing delegation is increased from \$2,000 to unlimited. Purchase Requisitions (PRs) will not stop at the Procurement Department for review.

It is imperative that PR's are entered accurately, because once they are approved and become Purchase Orders (POs), those orders are automatically transmitted to vendor without further review. The requesting department is responsible for proofing PRs to check each line item. Make sure that the item numbers and quantities are entered accurately, the correct vendor is selected and the correct shipping address is used.

New Laboratory Contracts Now in Effect:

- Digi-Key Corporation
- Leica Microsystems
- Instron
- PerkinElmer Health Sciences, Inc.
- Dove Medical, LLC
- Carlton Scale
- LabRepCo, LLC
- Medline Industries, Inc.
- Southern Air (for Non-Construction General Mechanical Services ONLY)





New Punchouts Available

Procurement is pleased to announce that both a Genesee Scientific punchout and a USA Scientific punchout has been added to HokieMart on Wednesday December 21, 2016. If you have questions about these new punchouts, please contact the HokieMart helpline at 540-231-2020.

The Hotel Roanoke: The Definitive Meeting Venue in Virginia's Blue Ridge

Book a meeting between now and January 2018 and we will give you 10% off all planned food events.



Located in the heart of downtown Roanoke and Virginia's Blue Ridge Mountains, our beautifully restored Tudor-style hotel offers 63,000 sq. ft. of versatile event space. Welcome attendees to symposiums and meetings of all size in the hotel's dedicated conference center, offering a 14,400 sq. ft. grand ballroom, 34 flexible meeting spaces and 330 recently renovated guest rooms.

The historic property is a joint project of Virginia Tech Foundation, Inc. and the City of Roanoke and operates as a Curio - A Collection by Hilton. The hotel's partnership with the University is key to a combined success! Your University designated Sales Manager Elizabeth Sandoz is happy to assist you or to make a personal call to your colleagues that have meeting or conference needs. Let us help you and continue the great partnership that has been established over the past 22 years. Learn more about the hotel at www.HotelRoanoke.com.

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hokiemart@vt.edu with the subject line:
The Cart Suggestions.