



Virginia Polytechnic Institute and State University
Policy and Procedures

No. 3220 Rev.: 13
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Subject: Direct Payment Procedures

1. Purpose

2. Policy

Direct Pay Procedures - Policy 3220

You can save time by being familiar with the Direct Pay procedures and learning what types of purchases fit correctly into this transaction type. The full university policy is at this web address: <http://www.policies.vt.edu/3220.pdf>. Direct Pay are transactions that do not require competition up to designated dollar levels.

The policy describes the types of items and the dollar limitations of items, which can be processed on the Direct Pay form in HokieMart.

To access the Direct Pay form in HokieMart, start on the Homepage. In the top section is a group of buttons labeled University Forms; select the button labeled **Direct Pay**. The HokieMart system does not deliver any direct pay forms to suppliers. If the supplier needs a copy of the purchase order (PO), **you** must send a copy to the supplier. HokieMart will not deliver a PO when using the Direct Pay form.

The directions to complete Direct Pay requisitions can be found on the Procurement HokieMart Training and Reference Material page <http://www.procurement.vt.edu/HokieMart/QuickGuides/QG%20Direct%20Pay%2001.15.14.pdf>

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Automated Request for Surplus Property Pick Ups: Paperless Enhancements Made

During the fall of 2015, version 1.0 of the surplus automated request system was made available for department's use at surplus.vpfin.vt.edu. The application allows university departments the ability to electronically complete the surplus property request form. The original version of the automated process still required a form to be printed, signed and delivered to the surplus property office. Building on the successes of the initial version, the surplus property office launched version 2.0 on 5/19/2016. The two major enhancements include electronic workflow and an ability to view your surplus history. With this latest version, departments no longer need to submit a paper document to the surplus property department.



To Copy Your Cart or Not

Often it is quick and easy to copy a cart when creating a repeat order from a vendor. It can save time if all the information from the previous order remains exactly the same.

When you copy a purchase requisition (PR) remember you are copying everything including the funding, contract number, and department information.

Below are some guidelines to help you decide whether to copy a cart or not:

- ⇒ If the contract or vendor has changed, a new PR will have incorrect information that can cause your order to go to the wrong vendor address or against an expired contract.
- ⇒ Be sure to always check funding when copying a cart. If an old PR was funded at the line item level it will copy this line level funding to the new PR.
- ⇒ If you are copying the cart and have changes in the department information (ex. different address), it will bring the previous information into your new cart which can cause errors or incorrect delivery.
- ⇒ If you have been advised by the HokieMart helpline that a cart has been rejected due to a systems or communication issue, copying the cart after the issue has been resolved normally works fine.

Final reminder:

Be sure to double check all your copied carts for changes that need to be made. In the long run your “copying” shortcut can cause you extra time due to errors if you do not review each item.

Buyer Spotlight

In this issue of The Cart, we want to spotlight Benny Snuffer, CPPB, CUPO, Buyer Senior/ Contracts Officer. He has been with Virginia Tech Procurement for seven and half years. Before joining VT, Benny had over 20 years of purchasing experience in the private sector. In his spare time Benny enjoys, hunting, skiing and camping!

Benny specializes in commodity purchases including athletic equipment, clothing and apparel, copier purchases, employee recognition items and printing equipment and supplies and services.

Benny’s buying philosophy is: “Competition is key in being successful in keeping costs at the minimum.”

Buying from HokieMart vendors, but who are not punchout vendors, provides the Requestor purchasing delegation up to \$2,000. When the dollar amount of an order goes over \$2,000, Purchase Requisitions (PR’s) are vetted through the Procurement Department first.

Benny shared that “The Procurement buying staff works together and assists each other to get the best pricing for the university.”

To view a complete list of commodities and the Procurement buying staff visit <http://www.procurement.vt.edu/Department/phone.html>

The Cart is distributed on an “as needed” basis. We appreciate your input. Please email hokiemart@vt.edu with the subject line: The Cart Suggestions.

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Surplus

The version 2.0 of the surplus application includes a basic electronic workflow that will allow requests to be electronically routed for approval to the designated approver. To facilitate this, a new field, "PID of Authorized Signatory" has been added to the request form. When completing a request, this field should be populated with the Virginia Tech PID of the person authorized to approve the request. Note, to ensure separation of duty, this PID **cannot** be the same as the person who is initiating the request.

To review new requests, users can log into the system and click the "Approve" link from the navigation bar. Pending requests can be either approved or denied by selecting the request and the corresponding action button ("Approve" or "Decline"). A nightly email reminder will be sent to any approver with pending requests.

History

Also new in version 2.0 of the surplus application is a history of previously submitted requests. By logging into the system and selecting "History" from the menu bar, users can see all requests that he or she has submitted or approved. A request can be in one of five statuses:

Pending Approval – status indicates that the designated approver has not taken an action on the request

Pending Surplus – status indicates that the request has been approved and is awaiting acknowledgement by the surplus property office

Pending Pickup – status indicates that the request has been acknowledged by the surplus property office and the material will be picked up by the surplus property office

Surplus Complete – status indicates that the surplus property office is now in possession of the surplus material and the request is complete

Request cancelled – status indicates that the request was cancelled before it was approved by the designated approver

Not Approved – status indicates that the request was not approved

Questions

⇒ **Functional questions** should be directed to the surplus property office (540-231-5660)

⇒ **Technical questions** should be directed to the HokieMart help desk (hokiemart@vt.edu)

Contract Corner

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



Procurement/IT Acquisitions is pleased to announce a **Newegg Business Punchout** in HokieMart effective April 21, 2016. The contract discounts will vary from 0 to 30% based upon commodity/manufacturer.

If you have questions concerning this new punch-out, please contact the HokieMart helpline at 540-231-2020.

Have you registered to attend the Small, Women and Minority-Owned (SWaM) Vendor Fair?

Sponsored by the Procurement Department, the vendor fair is designed to be campus wide. All University faculty and staff are welcome to attend. Come and find out for yourself what these SWaM vendors have to offer.

When: Wednesday Sept 7, 2016

Where: The Inn At Virginia Tech

Time: Noon - 4:00 pm

Door Prizes to registered attendees. Special Door Prizes for bringing a friend or co-worker.

A wide range of SWaM vendors will be in attendance

Consulting Firms

Catering

Engineering Firms

Promotional Items

Office Furniture

HVAC

Office Supplies

Lodging/Meeting Spaces

Food Equipment Services

Precast Concrete



Easy online registration — we'll even send you a reminder before the event.

<http://procurement.vt.edu/2016SwamFair>

You must register to be eligible for door prizes.

Registration deadline is August 31, 2016.

Join us for this informative event!

Telecommunication Purchases

As a reminder, departments are asked to consult with Network Infrastructure and Services (NI&S) prior to purchasing telecommunications equipment, such as:

- Routers
- Switches
- Load balancers
- Some servers, etc.

NI&S's technical staff can help ensure that your planned purchases will meet your business needs, and they may be able to suggest better alternatives. Collaboration with NI&S will help reduce the risk of redundant services that are also offered on an enterprise-wide basis, and/or that interfere with similar telecommunications services that are offered by NI&S.

When entering a purchase order in HokieMart, be sure to assign the correct Banner account code from the Procurement Department's list for each item or service purchased. Using a correct account code reduces the amount of time required to process your order by routing it directly to NI&S Customer Support Services. Not using a correct account code can result in delays in the purchasing process to obtain the NI&S review.

Please contact Bill Blevins or Terry Grubb with NI&S at 540-231-6460 or send email to cssnis@vt.edu to consult on your telecommunication needs.