

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

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| <b>Purchasing</b> | <b>3-022<br/>FISCAL SERVICES<br/>July 2021</b> |
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POLICY

- 1.01 OSU Institute of Technology (OSUIT) procurement practices are bound by policies established by the Board of Regents for the Oklahoma Agricultural & Mechanical Colleges, procedures set by the Office of Central Procurement for OSU and the A&M Campuses, and State Law. This policy is intended to list the general policies, procedures and practices which have been established to facilitate the procurement processes for OSUIT.
- 1.02 It is accepted that no policy and procedure statement can cover all eventualities. Exceptional cases will be resolved as circumstances and prudent business practices warrant.
- 1.03 The Purchasing department is administered by a Director whose line of administrative responsibility is through the Vice President of Fiscal Services and delegated by the campus President. Purchasing shall coordinate all purchases for OSUIT and inquiries or correspondence related to university purchases should be routed through this department.
- 1.04 It is the mission of Purchasing to assist in procuring needed materials, equipment, and contractual services on a timely and economical basis within accepted standards of quality and service so the mission of OSUIT is fulfilled. This office is the campus liaison between the Office of Central Procurement, University Accounting, and the OSU Fiscal & Administrative Compliance offices in Stillwater, and to campus suppliers with regard to procurement matters. While each campus department is responsible for complying with policies and procedures, the Purchasing department will assist in assuring that compliance is maintained.
- 1.05 It is the responsibility of each employee involved in the procurement process to become familiar with the procedures and apply them correctly. Purchasing is the primary source for information and training regarding procurement services for the campus.
- 1.06 Purchasing activities are routinely reviewed for compliance by purchasing staff, the OSU Fiscal & Administrative Compliance office, and by the OSU and A&M Board of Regents' Internal Audit Office. Purchasing shares responsibility with other OSUIT administrators in carrying out purchasing functions in such a manner that all transactions will pass compliance review and audit.

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- 1.07 Purchases by OSUIT are conducted in accordance with the following levels of governance:
- A. Federal Regulations (when federal funds are being utilized)
  - B. State Constitution
  - C. State of Oklahoma Statutes
  - D. Board of Regents Policies and Rules
  - E. OSU Policies and Procedures (3-0145, 3-0146)
  - F. Campus policies and procedures
- 1.08 Scope: This policy and subsequent procedures apply to the purchase of all goods, equipment and contractual services.
- 1.09 Consistent with Board of Regents' Policy, competitive bidding is required on most acquisitions or contracts in excess of \$10,000 as prescribed by the following:
- A. Any acquisition or contract for an amount of \$10,000 or less shall be exempted from competitive bidding procedures. Separate contracts or acquisitions for the individual components of a total project or service or split purchasing for the purpose of evading the requirement of competitive bidding shall be examined by Purchasing to determine if a policy violation occurred.
  - B. Contracts for architectural, engineering, legal or other professional services, as defined in Section 802 of Title 18 of the Oklahoma Statutes, shall be exempt from competitive bidding procedures.
  - C. Awards shall be based on "lowest and best" evaluation criteria unless assisted by the Office of Central Procurement. Bid openings are open to the public.
- 1.10 When system-wide or system-wide adopted contracts exist for the item(s) or service(s) needed, even if it is less than the no-bid limit, contracts should be utilized. Formal quotes or bids are not required for a single purchase of a non-repetitive order less than \$10,000, but contracts should be used if possible. Departments are encouraged to use approved state contracts whenever needs can be served adequately and economically for supplies and equipment. Prices include delivery to an Oklahoma address and Net 30 terms. The contract number and itemized prices as shown on the current contract must be listed on all quotes.
- 1.11 A purchase order is required before work begins or goods are received.
- A. The purchase order is the official notice to the supplier to proceed and is official evidence that the proper approval process has occurred, and that funding is in place to pay for the goods or services. Any invoice or claim dated prior to the purchase order date is a violation of encumbrance law and will require approval by the Chief Financial Officer for the invoice to be paid (reference 62 O.S. §34.62). Completing a purchase order in the e-procurement system should be done immediately upon the execution of a contract but no later than 30 days from the execution of a contract.

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- B. Ratification of an unauthorized commitment: “Unauthorized commitment” means an agreement that is not binding solely because the individual who made it lacked the authority to enter into that agreement on the behalf of the institution. “Ratification” means the act of approving an unauthorized commitment by an official who has the authority to do so. Unauthorized commitments may result in personal liability for the individuals who made the commitment. Any commitment issued to a supplier before approval and budget check will require ratification. Approval, budget check, contract review, signature, etc. is correctly routed through the e-procurement requisition process. The decision to authorize will be referred to the appropriate person at the university utilizing the *Ratification of an Unauthorized Commitment* form which can be accessed through the e-procurement system. The completed form must be received before the purchase order is issued and/or any payments can be made.
  
- C. Prior encumbrance on purchase card: Specific to OSU, Pcard payments are processed as direct-pay invoices in the system of record (Banner) rather than through the e-procurement system. Compliance is accomplished by establishing an annual blanket encumbrance set up directly in Banner. The encumbrance is liquidated in Banner as the monthly invoices are processed. The State purchase card contract, Banner encumbrance, and monthly invoice combined are the “encumbrance documents” required by state statute (62 O.S. §34.62.)

AUTHORITY TO APPROVE PURCHASES

- 2.01 Purchasing for all agencies under the jurisdiction of the Board of Regents for Oklahoma A&M Colleges shall be unified and integrated; the Chief Procurement Officer (CPO) shall coordinate these purchases. (Board of Regents Policy 2.07) The CPO for Oklahoma State University and the A&M Colleges, who offices in Stillwater, OK is the only person authorized to make purchase awards, commitments, or contracts for the university, unless specific delegation of authority is made.
  
- 2.02 Authority delegated to OSUIT
  - A. By delegation from the OSU System President, the OSUIT campus President is authorized to make direct purchases of supplies, materials, equipment and services when the dollar value is \$25,000 or less using the appropriate purchasing method. Without proper approval on record the university is not obligated to commitments for purchases.
  
  - B. The OSUIT President further delegates the authority for these direct purchases \$25,000 or less, within certain limitations, to designated personnel on the basis of function and type of funds used under the guidance of Purchasing.
  
  - C. OSUIT, through its purchasing department, has delegated authority by the Office of Central Procurement to procure products and services for OSUIT up to \$25,000 in strict compliance with all related policies and procedures.

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- 2.03 All contracts, regardless of amount, require the CPO for OSU and the A&M Colleges' signature. All contracts and equipment lists should be attached to the requisition and submitted for approval through the requisitioning process.
- 2.04 Personnel who have received training and been issued a university purchase card, hereinafter referred to as "Pcard", are authorized to make approved, single purchases up to the lesser of their single transaction limit or \$5,000. These purchases shall be in strict compliance with university policies, procedures and guidelines as they relate to Purchasing and the Pcard.

PURCHASING METHODS: Dollar Limits and Requirements

3.01 Purchase Card (Pcard)

The Pcard is a State of Oklahoma purchase card program that establishes the use, by designated State employees, of commercial purchase cards to facilitate the acquisition of goods and services necessary for conducting official State business. This program, a state contract awarded to a national, issuing bank is authorized by the Oklahoma Central Purchasing Act (74 O.S. § 85.5(C.) (15.) & (L.).

OSU's purchase card program is intended to facilitate the acquisition of lower dollar goods and services, not available through the e-procurement system, needed for conducting official university business.

The Pcard is issued to select university employees. The cardholder is accountable for all charges made with their Pcard. Use of the Pcard is solely for official university purchases. Personal purchases are strictly prohibited and may result in disciplinary action. The Pcard program may be extended to OSUIT student organizations provided all compliance requirements are met. This program is the method designed to make most of OSUIT's small dollar purchases except for those that can be acquired through system-wide or system-wide adopted contracts.

In conjunction with this program, the issuing bank furnishes access to online transaction information used to track and review all Pcard purchases for continuous reconciliation and funding verification prior to data transmission for accounts payable processing.

Guidelines for the OSU Purchasing Card Program have been established and are available from Purchasing. These guidelines are intended to ensure compliance with State statutes. Purchasing and Fiscal Services may, at their discretion, establish additional requirements within these guidelines to ensure campus compliance with regard to the procurement of goods and services for official university business.

Training is required for all cardholders and others requiring access for various roles within the online transaction system. The cards issued, although bearing a VISA or MasterCard logo and accepted as such, are not credit cards but purchase cards.

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These cards are the property of OSUIT and must be returned upon leaving employment or at the request of administration. The cardholder is the only person authorized to make purchases using his/her card.

Being issued a Pcard does not imply prior approval of all purchases. The cardholder must follow applicable University policies and procedures, departmental procedures, and any departmental pre-approvals.

- A. While \$5,000 is the university's limit for Pcard purchases; single and monthly transaction card limits for OSUIT cardholders vary based on function and anticipated spend.
- B. All Purchasing staff maintain the \$5,000 card limit to help meet the needs of the campus for purchases that exceed departmental cardholder single transaction limits and to reduce the university's liability exposure.

If goods and services are not initially allowed on Pcard, they must not be purchased with the Pcard even if they will be reimbursed at a later date.

### 3.02 Requisitions

The university maintains an electronic procurement system as a method of acquiring goods and services to facilitate university goals. This system is used to process all requisitions and issue purchase orders through the Purchasing department.

- A. Any purchase that cannot be made on a Pcard, as outlined in this policy, should be submitted, along with any support documents, through the e-procurement system to Purchasing.
- B. All purchases over \$5,000 must be processed on a requisition.
- C. \$10,000.01 to \$25,000: Oklahoma Statutes and university policy require the solicitation of competitive quotations for these acquisitions and contracts. Departments must provide Purchasing with specifications listing all minimum requirements.
- D. \$25,000.01 to \$50,000: In accordance with Oklahoma State Statutes, both Board of Regents and OSU policy require competitive bids to be conducted by the Office of Central Procurement. Departments must provide specifications listing all critical elements.
- E. \$50,000.01 and larger: In accordance with State Statutes, these purchases require formal sealed competitive bids to be conducted by the Office of Central Procurement.

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These purchases require approval of:

- Campus President
- OSU A&M System Vice President
- OSU A&M System President (if \$100,001 or more)
- Board (if \$250,000 or more)

3.03 Board Approval

Regardless of funds used, advance approval by the Board of Regents is required for purchases that exceed \$250,000.

- Purchases that are exempt from Board approval are: food or items for resale, bulk gasoline, oil and fuel, utilities, non-construction sponsored agreement contracts and expenditures, and refunds.

3.04 Specific procedures apply for the following items:

A. Must be ordered by requisition

- Insurance
- Professional services and honorariums
- Purchase or lease of land or building space
- Trade-out agreements
- Purchases from university/state employees
- Purchases for employees (awards, clothing, etc.)

B. Must be routed through other departments

- Computer hardware and software
- Maintenance agreements
- Repairs to buildings
- Printing and duplicating services
- Public Improvement Projects
- Carpeting
- Travel
- Used equipment
- Vehicles, vehicle supplies/repairs
- Subscriptions or periodicals
- Grant or Plant Fund expenditures (Ledgers 5 & 7)

C. Additional procedures apply

- Emergency orders
- Repairs to equipment
- Retreats
- State surplus property

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3.05 Campus Vendor Invoices

All transactions for goods and/or services between OSU departments and campuses are processed through the Campus Vendor System. The Campus Vendor Invoice (CVI) is prepared by the department and submitted to the Accounting Office for processing.

PROCEDURES

4.01 PCard

- A. Participation/Training: Specific training is required before a Pcard can be issued to any employee and for any individual who will hold a user role (i.e., approver, accountant) in the electronic approval process.
1. An *Application* form for Pcard and/or the User Access role(s) must be completed to request a Pcard and/or to be assigned one of the user roles (i.e., cardholder, approver, accountant, etc.). Cardholder dollar limits are established with the completion of this form.
  2. A *Conflict of Interest* form must also be completed by Pcard holders. This form is renewed each year.
- B. The cardholder must sign a *Purchase Card Employee Agreement* form upon receipt of the Pcard.
- C. A Pcard should be used by departments for qualified purchases within the Pcard limit that are not available through contract options. This amount must be inclusive of installation, freight, shipping or any other related costs. For good business practices, employees are encouraged to check availability and pricing with more than one supplier prior to purchase.

In cases of qualified purchases as listed directly below whereby the Pcard cannot be used, a quote should be obtained and sent to Purchasing through the requisition process prior to receiving the goods or services. Failure to have a purchase order issued prior to receipt of product or service is a violation of policy (See 1.11).

1. The vendor does not accept Pcard.
  2. The vendor demands an up-charge/fee for the use of the card.
  3. The purchase is not in compliance with Pcard policies, procedures and guidelines.
- D. The Pcard program establishes the rules for use by designated university employees. These rules, outlined in the OSU Purchasing Card Guidelines, cover the use of commercial purchase cards to facilitate the acquisition of lower dollar goods and services needed to conduct official university business. All cardholders and employees should familiarize themselves with the Guidelines.

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- E. Being issued a Pcard does not imply prior approval of all purchases. The cardholder must follow applicable University policies and procedures, departmental procedures, and any departmental pre-approvals.
- F. Ordering: Determine if the anticipated purchase is prohibited or conflicts with university policies. If it is determined that the anticipated purchase requires additional processing, or must be done by requisition, it is excluded from Pcard payment.

Select a vendor who can supply the needed items at a reasonable cost and obtain the following information:

1. A firm price quotation must include applicable delivery charges as well as the date, and name of the person making the quote. When appropriate, additional quotes from other suppliers may be requested for the purpose of making the best buy.
  2. If the vendor does not accept Pcard see 4.01 C.
  3. The supplier should be given specific delivery instructions (if required) and should be requested to send an original invoice directly to the ordering department. If merchandise is picked up by the department, the invoice may be obtained at that time. The invoice must include itemized pricing, vendor's complete name, address, etc.
- G. Procedures for the receipt of merchandise: The ordering department is responsible for the inspection of all items to verify goods received are as specified and for contacting the supplier for correction, if necessary. In the event of an impasse between the ordering department and the supplier, assistance may be obtained from Purchasing. Do not pay invoices on merchandise intended for prompt return. Instead, contact the vendor for the credit memo to match with this invoice to allow payment of only the items kept. Follow up on these invoices to keep suppliers paid.
1. Audit each invoice for products received, pricing, extensions and the correct invoice total. Any discrepancies should be corrected with the supplier immediately.
  2. Check for a cash discount. If offered, deduct cash discount when paying the invoice. Verify appropriateness of sales tax, if charged. As a state agency, the university does not pay sales tax on purchases within the State of Oklahoma.

If sales tax has been charged on a purchase within Oklahoma, the cardholder is responsible for contacting the vendor for removal of this tax, and may be responsible for reimbursing the university for these taxes.



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3. When the estimated cost of product or service exceeds the cardholder Pcard limit and is less than \$5,000, contact Purchasing for assistance. This amount must be all-inclusive, including freight and any other related charges; otherwise, a requisition must be used.

Campus departments and service units should communicate the procurement need to Purchasing via email along with all pertinent support documents including quotes (if any) obtained by the department.

- 4.02 Certain types of purchases are prohibited by the State of Oklahoma. Certain purchases may be allowable if processed on a requisition, but they may not be made with a Pcard. If goods or services are not initially allowed on Pcard they must not be purchased with the Pcard, even if they will be reimbursed at a later date.

A. Restricted Purchases

- Food
- Items purchased for Resale
- Conference Registrations
- Conference Training Expenses (Hosted by OSU/OSUIT)
- Clothing, footwear and/or Uniforms for Employees (Before clothing can be purchased for any employee a taxability determination must be made. The *Request for Determination of Taxability* form must be completed by the department and submitted to the Vice President of Fiscal Services for determining. That determination impacts whether or not Pcard may be used.)
- Student Organization Expense

B. Prohibited Purchases

- Gifts, including cards, flowers, gift cards
- Postage
- Personal items
- Decorations
- Alcohol
- Cash, cash advances, ATM transactions
- Convenience fees, aka credit card fees, up-charges, etc.
- Donations
- State of Oklahoma sales tax
- Weapons and/or ammunition
- Items that do not serve a business purpose

REQUISITION/PURCHASE ORDER PROCESS

- 5.01 Any purchase that cannot or should not be made on a Pcard should be submitted to Purchasing through the requisition entry process.

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Any and all support documentation for the requisition, including but not limited to specifications and the vendor list, should be included. This information will be combined with the University's Terms and Conditions to create the appropriate type of solicitation for competitive bidding:

- Request for Quotation (RFQ) – generally for items that are well understood, detailed specifications are available, and the objective is to find the best price. Price is the main consideration with all other things being equal and generally, the award goes to the lowest price that meets all stated specifications.
  - Request for Proposal (RFP) – a request for competitive proposals from suppliers. The evaluation method can be “lowest and best” or “best value.” RFPs with “best value” evaluation methodologies are generally stated in terms of expected outcomes and are less prescriptive. Departments should clearly state the desired outcomes and the expected deliverables. Suppliers’ proposals are evaluated according to how well their proposal will meet the stated need and the ability of the supplier to deliver as promised. Evaluation criteria must be developed and set prior to publication of the RFP.
- A. Specifications in Word format are used to provide detailed information including minimum requirements and all critical elements to potential bidders for all items to be purchased.
- B. Specifications are to be established by the requesting department and will not be changed or substituted by Purchasing without prior consultation with the department. Specifications shall be written to provide open competition and to ensure procurement of satisfactory merchandise. The specifications must include all critical, technical, and performance data, compatibility requirements, a referential model number and manufacturer, all important operational features, and Scope of Work where applicable.
- C. A supplier listing that includes current addresses and contact information including email, telephone, fax and website should be attached. Email addresses are required. Other possible sources may be investigated by Purchasing.
- D. Examples of support documentation that may need to be attached include, but is not limited to:
- Quotes
  - Professional Service Affidavits
  - Non-Collusion Affidavits
  - Contracts
  - Renewal Letters
  - Equipment Lists
  - Registration Forms

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- E. If any item is to be restricted to one supplier or to one manufacturer, then the requisition must be started using the *Sole Source/Sole Product Form* that is available within the “Form” tab in the e-procurement system. Requests must be in compliance with State of Oklahoma statutes.
  - F. Student Technology Fee purchases: Meeting minutes recording student approval for purchases utilizing Technology Fee monies are not required to be attached to the requisition; rather, they are to be maintained within the academic department.
  - G. Requisitions: All requisitions will be placed into approval workflow by Purchasing based on the information provided.
- 5.02 Requisition Entry: Department personnel initiate a requisition within the e-procurement system by accessing the site and as a “shopper” either making selections from the available suppliers, making a non-catalog entry, or using a form, and uploading any support documents. The requisition is assigned to the OSUIT Purchasing Director where it will then be routed for departmental, vice presidential and administrative approval as required.
- 5.03 Requisition Processing: the requisition is matched with the appropriate support documents and submitted into workflow electronically by Purchasing to University Accounting and the Office of Central Procurement in Stillwater for processing.
- The Office of Central Procurement will process a requisition as allowed, obtaining quotations or scheduling competitive bidding as needed. Requests are sent to potential bidders for quotations with established due dates.
- Once bids are opened, the results are sent electronically for departmental evaluation and recommendation for award. Timing for this process varies and can range from days to weeks to process from requisition to the purchase order being issued to the vendor.
- 5.04 Bid Evaluations: Bids are evaluated by the ordering unit in consultation with Purchasing. Depending on type of bid (RFQ or RFP) the "lowest and best" or “best value” bid is recommended for award. The recommendation to award is made through the e-procurement system to the assigned buyer in the Office of Central Procurement. The evaluation should meet all policy requirements of law and fairness. Based on an acceptable evaluation, a Purchase Order is issued. The university reserves the right in all cases to reject all bids and either re-bid or cancel the requisition.
- 5.05 Purchase Order: If approved, the requisition is converted into a Purchase Order, and the order is placed with the vendor. Once issued, copies of all purchase orders can be viewed online in the e-procurement system.
- 5.06 Change Orders: If it is necessary to change a purchase order, the department is to provide written details immediately to Purchasing via the *Change Order Request Form* available in the e-procurement system which will implement the approved changes to the order and be sent the vendor.

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Change orders are required for the following:

- When invoice amount exceeds 15% of the original purchase order amount
- To increase or decrease quantity or unit price
- To correct pricing
- To add shipping
- To re-open, close or cancel a purchase order
- To add additional accounts or separate split accounts
- To add additional products or services
- To change fiscal year

5.07 Invoices for products and services requisitioned through the e-procurement system request campus billing to OSUIT Purchasing and [okmpurchasing@okstate.edu](mailto:okmpurchasing@okstate.edu) for manual invoices from the supplier. The ordering department is responsible for matching the invoice to the appropriate order and approving payment as appropriate and returning invoices to Purchasing for payment processing. For all invoices received via the e-procurement system the ordering department is responsible for “receiving” the invoice by examining the invoice (price billed to PO price) for correctness. If there is a discrepancy, Purchasing is to be contacted for assistance and reconciliation. If the invoice is correct and has been received the shopper must create a receipt in the e-procurement system to allow the invoice to be paid.

The university’s payment terms are Net 30 and all invoices should be approved for payment in a timely manner to avoid delays in the vendor receiving payment within these terms. Should there be an issue or dispute with an order/invoice that may hinder prompt payment Purchasing should be contacted to assist with resolution.

The ordering department is responsible for authorizing payment of these invoices. Invoices should be audited for products received, pricing and extensions. Any discrepancies should be corrected immediately. Approved invoices should be forwarded in a timely manner to Purchasing for processing.

5.08 Procedures for the Receipt of Merchandise and Services: The ordering department is responsible for the inspection of all items to assure goods and services received are as specified and for contacting the supplier for correction if necessary. In the event of an impasse between the ordering department and the supplier, assistance may be obtained from Purchasing. The university does not pay invoices on merchandise intended for prompt return. Instead, the ordering department should contact the vendor for a credit memo to match with this invoice to allow payment of only the items kept. Departmental personnel in conjunction with Purchasing must follow up on these invoices to keep suppliers paid.

5.09 Payment: Purchasing will verify, upload the approved invoice(s), noting the amount approved for payment, and then submit via the e-procurement system to University Accounting for payment processing.

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VENDORS

- 6.01 Credit Application: The State of Oklahoma does not allow state agencies to acquire credit. If needed, Purchasing may assist with direct billing accounts with vendors.
- 6.02 Where new vendors are to be used for purchases, a completed Form W-9, *Request for Taxpayer Identification Number (TIN) and Certification* should be requested from the supplier and forwarded to Purchasing via the *New Vendor Request Form*, found in the e-procurement system. This information will be transmitted to the Office of Central Procurement for input into the e-procurement system.
- 6.03 Vendor Relations: Departments are encouraged to seek information on products and services from vendor representatives. They are a valuable source of information. Purchasing should also be advised of department needs to better assist in locating vendors and developing a procurement plan.
- 6.04 Vendors cannot assist with the development of specifications for items that will be sent out for bid. Assistance with specification development can disqualify a supplier from participating in the solicitation process.
- 6.05 Communication with vendors during the bid process is prohibited. All vendor communication during the bid process must be directed to the assigned buyer in Purchasing.

CONTRACTS

- 7.01 Computer Technology: OSU has a competitive contract for computers. Contact OSUIT Technology Services for purchases of computer technology (including tablets) and software. All computer accessories and software purchases must be approved through this department.
- 7.02 Printers: Contact Technology Services as these purchases require their approval.
- 7.03 Furniture: System wide contracts are available for furniture purchases; the chart below provides guidance based on the anticipated dollars to be spent. Contact Purchasing for assistance.

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| Anticipated Furniture spend | Guidance  |
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| \$0 to \$5,000              | Process as a small dollar purchase following standard purchasing policy.  |
| \$5,001.00 to \$24,999.99   | Departments may obtain a quote or quotes, if desired, from any contract supplier(s) and process the order following standard purchasing policy. If utilizing a non-contracted supplier/product line then 3 quotes are required. |
| \$25,000.00 to \$249,999.99 | The Office of Central Procurement will conduct an electronic bid process through the e-procurement system soliciting all contracted suppliers and others, as applicable.  |
| \$250,000 and up            | The Office of Central Procurement will conduct a formal sealed bid through the e-procurement system soliciting all contracted suppliers and others, as applicable, with the assistance of OSU Long Range Facilities Planning.   |

- 7.04 State Contracts: The State of Oklahoma provides contracts for a multitude of items. These items can be ordered without having to go through a bidding process. Contact Purchasing for guidance.
- 7.05 Yearly Contracts: Purchasing will assist departments in planning for yearly renewal of contracts (equipment leases, maintenance and contractual services). All equipment lists greater than \$10,000.00 require the CPO's signature. Contact Purchasing for guidance.
- 7.06 Service Contracts: all service contracts (maintenance and repair of equipment and building) requiring vendors to perform work on campus must be approved through Purchasing. A service agreement must be completed and submitted to Purchasing with the vendor's insurance verification attached. The vendor may be required to complete an *Affidavit of Completion* once the work has been completed. All contracts must be signed by the CPO for OSU and the A&M Institutions.  
All contracts, regardless of amount, require the CPO's signature. All contracts and equipment lists should be attached to the requisition and submitted for approval via the e-procurement system.
- 7.07 Purchasing Forms: Purchasing forms can be accessed on the Purchasing webpage.
- 7.08 The university's most current purchasing contracts can be found through the e-procurement system.

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PURCHASING RECORDS & RETENTION

- 8.01 Original invoices for purchases (requisition/PO) as well as all Pcard documents must be retained for a minimum of seven (7) years after the audit of the fiscal year the transaction occurred. Eight years after the transaction date, departments may contact OSUIT Accounting Services to request permission for destruction. Only when permission and instructions for destroying have been received in writing can those documents be destroyed according to policy.
- 8.02 All records shall be maintained as prescribed in OSUIT Policy 1-014, Records and Documents Retention, Security and Control.

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