



Purchasing Policies and Procedures

Overview 1-00

The Purchasing Department is the official purchasing agent for Georgia State University. **All contracts (including supplier terms and conditions), regardless of dollar value, must be reviewed and approved through Legal Affairs following the processes outlined in these procedures.** Purchasing is responsible for issuing orders for materials and services in compliance with State and Federal laws under the guidelines imposed by the Department of Administrative Services State Purchasing Division, The Georgia Technology Authority, and the Board of Regents of the University System of Georgia.

As a service-oriented organization, the Purchasing Department assists University personnel in areas such as vendor selection, product availability, current prices, specifications, etc. The Procurement Specialists in the Purchasing Department are experienced professionals and can assist with problem resolution.

Code of Ethics

Georgia State University subscribes to the State's Code of Ethics for Governmental Service. Among the provisions relevant to the relationship between state staff and suppliers are the following:

- All persons in government should:
- Uphold the Constitution, laws and regulations of the United States and the state of Georgia and of all governments therein and should never be a party to their evasion;
- Never discriminate unfairly by dispensing special favors or privileges to anyone, whether for remuneration or not; and never accept for themselves or their families favors or benefits under circumstances which might be construed by responsible persons as influencing the performance of their governmental duties;
- Make no private promises of any kind binding upon the duties of office, since a government employee has no private work which can be binding on public duty;
- Engage in no business with the government either directly or indirectly which is inconsistent with the conscientious performance of their governmental duties;
- Never use any information divulged to them confidentially in the performance of governmental duties as a means for making private profit; and
- Expose corruption whenever discovered.

All parties involved in the negotiation, performance, or administration of Georgia contracts must act in good faith. Each party must act with honesty and integrity and should not attempt to deceive or defraud another party.

The Purchasing Department is located in Suite 901, One Park Place South, Atlanta, GA 30303.

Please contact the department for assistance at purchasing@gsu.edu or 404-413-3150.

Policy 1-00P – Procurement Definitions

Request for Quotation (RFQ)

A Request for Quotation (RFQ) is a formal solicitation method that includes a well-defined specification or scope of work and contains all contractual terms and conditions. The RFQ solicits sealed price quotations or bids from prospective vendors and seeks to obtain price quotes from qualified vendors using the lowest quote as the determining factor for awarding the contract. Request for Quotes should be used if the project lends itself to the creation of a clear and accurate Statement of Work and the objective of the solicitation is to identify a vendor who can provide the required specifications at the lowest possible cost.

Competitive Solicitations Guidelines & Posting Requirements

Public Posting Guidelines	
If the Estimated Contract Value is...	Then, the Posting Period is...
\$0 - \$25,000	No Posting Required
\$25,000 - \$99,999.99	Minimum of Three (3) Business Days
\$100,000 - \$249,999.99	Minimum of Five (5) Business Days
\$250,000 or more	Minimum of Fifteen (15) Calendar Days (mandated by Georgia law)
Solicitations for construction/public works contracts equal to/greater Than \$100,000 & less than \$250,000	Minimum of Fifteen (15) Calendar Days
Solicitations for construction/public works contracts greater than \$250,000	Minimum of Thirty (30) Calendar Days

Request for Proposal (RFP)

A Request for Proposal (RFP) is a formal solicitation method that seeks to leverage the creativity and knowledge of business organizations to solve a unique problem. The RFP solicits sealed price proposals from prospective vendors and seeks to obtain the “best value” for the state. The RFP method does not use the cost of the project as the single determining factor, but, rather, uses a combination of lowest cost plus best proposed solution to determine the award. Points are provided to technical and financial proposals submitted. Contract awards are based on the highest points received by submitted proposals.

Committees are established to score the technical portion of the RFP. The Purchasing Department's Representative (Issuing Officer) will score the financial portion of the RFP. Request for Proposals should be used if the project does not lend itself to the creation of a clear and accurate Statement of Work and the objective of the solicitation is to identify a vendor who can offer the best possible solution to your problem at the most reasonable cost. Departments should allow six to eight weeks to complete the RFP process.

Sole Brand Solicitation

A *sole-brand solicitation* is a competitive solicitation which includes specifications restricting offered goods to a specific manufacturer or owner's brand. Before deciding that only one specific brand of goods will meet the state entity's critical business requirements, research must be conducted by the procurement professional to determine if other brands exist which can also satisfy procurement requirements in a timely manner. Sound procurement practice requires that a sole-brand solicitation be used only when it is the last justifiable option, and not as an attempt to contract for a favored brand of goods. An example of the appropriate use of the sole-brand justification may include certain situations where a specific piece of equipment is needed to match existing equipment or is a replacement.

Sole Source Solicitation

Based on market analysis, the procurement professional may determine only one supplier can provide the needed goods or services. This is referred to as a sole source purchase. *Sole-source purchases* must be distinguished from sole brand purchases in which more than one supplier is capable of providing the specific item.

For purchases with a value of \$25,000.00 or more, sole-source purchases are prohibited unless the state entity establishes justification why the needed goods or services should not be procured through open competition. Sound procurement practice requires that a sole-source purchase occur when it is the only option and not as an attempt to contract with a favored service provider or for a favored good. Some examples in which a sole-source purchase may be acceptable are:

- Only one supplier can satisfy the technical requirements because of unique technical competence or expertise.
- Only one supplier possesses patents or exclusive rights to manufacture or to furnish the item or service.
- Only one supplier can furnish the services because of the supplier's previous state entity experience and having an alternative source duplicating these capabilities would result in excessive costs to the state entity.
- The item does not satisfy any of the justifications noted above, but the use of any other manufacturer's goods or equipment would result in excessive costs to the state entity.

DOAS – [Department of Administrative Services](#)

BOR – [Board of Regents of the University System of Georgia](#)

CUPO – College and University Procurement Officer

SPD – State Purchasing Division

GPM – [Georgia Procurement Manual](#)

GPR – [Georgia Procurement Registry](#)

ITPR - IT Procurement Review

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FMR – Facilities Modification Request

PURCHASING METHOD: POLICIES AND PROCEDURES

Policy 1-00-10.1 - G.S.U. Purchasing vs. DOAS State Purchasing

By order of the Board of Regents, all units of the University System of Georgia must comply with the rules and regulations of the State Purchasing Division of the Department of Administrative Services (DOAS). These rules and regulations have been developed to promote equal access and competition among vendors to ensure that best value, high-quality goods, and services are available to state and local governments.

The GSU Purchasing Department has unlimited delegation (within budget) to issue Purchase Orders for Request for Quotes. Additionally, the GSU Purchasing Department has the authority to issue Request for Proposals up to one million dollars. Any RFP valued above one million dollars may require processing by the Department of Administrative Services (DOAS), State Purchasing.

Policy 1-00-11.1 - Purchases Made Under Research Grants and Agreements

All purchases under contracts, grants, or agreements are subject to State of Georgia and Federal Purchasing Regulations, to Board of Regents of the University System of Georgia policies, and to University policies.

Expenditures for obligations incurred under contracts, grants, or agreements cannot be made for purposes other than those for which State funds can be expended, unless an exceptional type of expenditure is specifically authorized and stated by the donor or grantor as a requirement of the grant, contract, or agreement.

The new Office of Management and Budget (OMB) Uniform Guidance (UG) went into effect on December 26, 2014, and will apply to awards or funding increments issued on or after that date. Purchases funded by federal grant funds must adhere to regulations found in Uniform Guidance as a condition of receiving funds and to meet annual audit compliance. To maintain consistency, Georgia State University will implement the new federal procurement guidelines for all sponsored grants and contracts 7/1/2018. **Please see the GSU Uniform Guidance Purchasing Requirements on the Business Services website.**

Policy 1-00- 12.1 - Unauthorized Purchases

Unauthorized purchases are improper and illegal, and the purchaser or the department may be held responsible for the incurred charges.

Examples of unauthorized purchases include, but are not limited to, any purchase over \$24,999.99, purchases of restricted items of any price (e.g. food or personal items), purchases requiring pre-approvals without such approvals, not buying from mandatory Statewide contracts, and sequential, repetitive purchases made in an attempt to avoid the \$25,000 bid limit.

According to State statute, materials and /or services which cost \$25,000 or more, shall be competitively bid. Therefore, repetitive purchases from the same vendors on the same day or on consecutive working days may be cause to disallow the reimbursement. The \$25,000 limit may not be circumvented by splitting a purchase from one vendor on consecutive days, by charging part of a purchase to one account and part to another account, or by having two or more people buy separate parts of an order. If purchases
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are made in these or any other manner to avoid the \$25,000 limit, they may be disallowed and become the responsibility of the individual making the purchase.

Purchase Orders, regardless of the dollar amount, will not be accepted when the department has already received goods or services. If the total cost is less than \$4,999.99 or under, payment can be made using a Purchase Card.

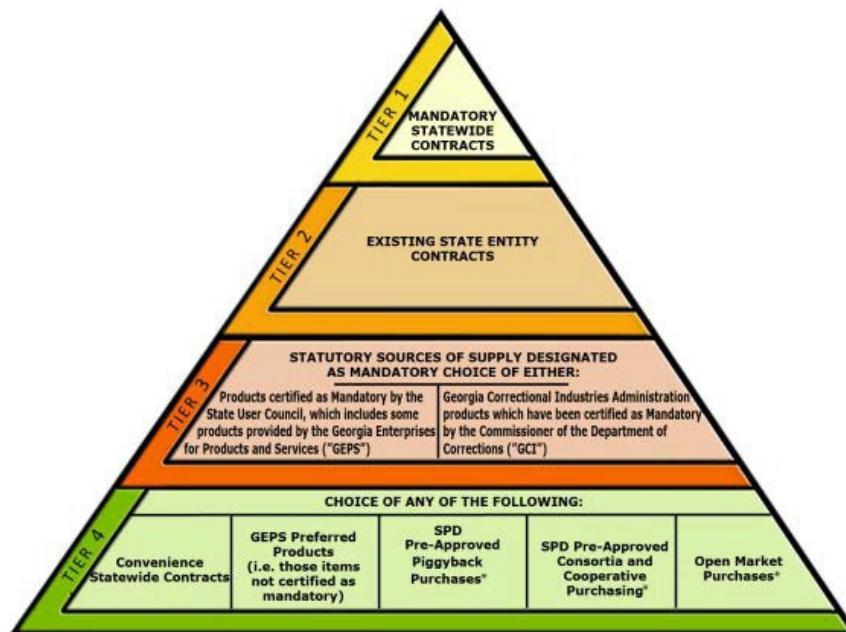
Procedure 1-00- 13.1 - Unauthorized Purchases

When an unauthorized purchase is recognized, the department will be notified, and appropriate actions may be taken to discipline the purchaser and recoup any funds expended in an improper manner. The Director of Business Services will contact the head of the division or college where the purchase was made and will notify the appropriate person of the actions that need to be taken to remedy the situation.

Policy 1-00- 13.2 - Order of Precedence

The State through the Department of Administrative Services maintains an order of precedence for the source used for the purchasing of items and services.

The Order of Precedence is shown in the Georgia Procurement Manual as follows:



Procedure 1-00- 13.2P - Order of Precedence

Departments should consult the Statewide Contract lists on both the DOAS site and the GTA site to determine if the goods or services desired can be obtained from an existing contract.

The majority of Statewide Contracts are mandatory. In the event a mandatory statewide contract exists, the state entity must use the mandatory statewide contract unless DOAS State Purchasing Division (SPD) grants a written waiver. SPD's approval of any requests for waivers will be limited to purchases with a specified time frame and/or dollar value. Justifiable reasons include, but are not limited to:

- The state entity's ability to pay,
- Cost,
- Delivery time, or
- Compatibility with existing state entity situations.

To access Statewide contracts, click on the Team Georgia Marketplace™ icon and log in using the following guest ID and password.



ID: tgmguest
Password: tgmguest

[Click Here](#)

<http://doas.ga.gov/StateLocal/SPD/Pages/StatewideContractIndex.aspx>

Select contracts then search to bring up a listing of all Statewide contracts.

Departments may also contact the Procurement Specialist in Purchasing for the specific commodity to determine if contract, GCI or Georgia Enterprises source exists.

Policy 1-00-13.3 - Minority Suppliers

State Policy encourages the use of Minority and Small Business suppliers whenever possible.

Procedure 1-00- 13.3P - Minority Suppliers

Departments making a contract purchase should consult the contract list and where multiple vendors are available to determine if a Minority or Small Business vendor is available for ordering.

Departments making an open market purchase should consult the State's Office of Small and Minority Business to determine if any supplier is available for the items or services being purchased.

Policy 1-00- 13.4 - Size and Type of Order

The size of an order is gauged by dollars expended affects the methods that a department may use to acquire goods and services. The aggregate value of the order determines the method used and not the values assigned to individual line items on the order.

All orders with an aggregate value of \$25,000 or more require the use of a PO. POs of \$25,000 or more must be competitively bid unless the items are available through a Statewide Contract or other allowable exception.

Orders with an aggregate value of \$24,999.99 or less may also require the use of a PO depending on commodity.

Policy 1-00- 13.5 - Vendor Entry, Correction or Addition

The use of a Payment Request or PO requires that the Vendor be entered into the Panther Mart Vendor Database prior to the Payment Request or PO being entered into Panther Mart. Departments are responsible for the use of current and correct vendor information and it is the responsibility of the department to request the entry, correction or addition of vendor information.

The entry of a PO or Payment Request without current vendor information is an unacceptable practice and should be avoided.

Procedure 1-00- 13.5P - Vendor Entry, Correction or Addition

Departments should ask vendors to complete a Vendor Profile Form. The completed Vendor Profile Form must be forwarded to suppliers@gsu.edu for processing. The Vendor Profile Form must be submitted when a vendor is not in the Panther Mart Vendor Database, or when corrections or additional information is needed.

Corrections and additions to existing Vendor Entries should include justification as to why the addition is being requested.

Requests for entry of employees into the database should be directed to Human Resources. Changes to employee addresses can be completed through OneUSG.

Requests to add students should be directed to suppliers@gsu.edu. Please e-mail name, panther number, and address.

Policy 1-00- 14.1 - Purchasing with a Purchase Card

When ordering goods and services with an aggregate value of \$4,999.99 or less where the use of a PO is not required, the use of a Purchase Card is the preferred method of acquisition. Purchases should be made within the cardholder's established single transaction limit (STL).

Procedure 1-00- 14.1P Using a Purchase Card

Details on requesting, using and reconciliation requirements for Purchase Cards can be found on the Purchasing Web Site.

NOTE: Purchases made for use at the University are in most cases exempt from Sales Taxes. Departments should let the vendor know that no sales tax should be charged to their purchase. If the vendor requests confirmation, a copy of the tax exemption form should be provided. The form can be obtained by contacting the Purchasing Card Administrator.

Policy 1-00- 14.2 Purchasing with a Payment Request Form

When it is not possible to use a Purchase Card or a PO is not required, all purchases of \$2,499.99 should be made using a Payment Request Form..

Procedure 1-00- 14.2P - Using a Payment Request Form

Payment Requests are entered into the Panther Mart system using the Payment Request Form.

Instructions for entering Payment Request

1. Complete all required fields including reason for payment
2. Attach all supporting documents to the form
3. Be sure to add the correct accounting information on the requisition document
4. Enter only one invoice number per Payment Request Form

Note: Invoices must be date stamped upon receipt to ensure payments are made within State of Georgia standard payment terms of Net 30.

Policy 1-00-14.3 - Purchasing with a Purchase Order

Purchase orders are required to purchase goods and services greater than \$2,500, excluding the following categories:

- Attorney and legal related payments, as such procurements are prescribed to the Department of Law via OCGA §45-15-34
- Benefit payments made directly to recipients
- Intergovernmental agreements/payments (e.g., Georgia Technology Authority (GTA) bills, Risk Management premiums, Human Resources Administration (HRA) assessments, etc.)
- Membership dues and/or subscriptions
- Payroll and associated tax and benefit payments
- Postage and shipping
- Certain Purchase card (P-card) transactions
- Real estate rental/lease payments
- Registration fees
- Sales and Use tax payments
- Travel expense reimbursements
- Utilities (e.g., electricity, telephone land lines, cell phone charges, etc.)
- WEX and ARI payments

Services, regardless of the dollar amount, require a contract to be routed through the contract routing form process.

The PO is the method by which a department's requirements are requested and funds encumbered for that particular requirement. **The PO is the only method by which a department may request goods or services totaling \$25,000.00 or more.**

All POs are entered into the Panther Mart system and will be forwarded to Purchasing after the required approvals have been obtained.

The PO is not an official authorization to purchase. The Purchasing Department must competitively bid the requirement, if necessary, and issue an official Georgia State University Purchase Order.

The date that the requestor enters the PO is not the benchmark date. The date on which all approvals are complete, and the PO is forwarded by Panther Mart to Purchasing is the date used as the request date.

The Requestor should be the person who will be responsible for the PO during processing, i.e. the person
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to whom all questions and requests for additional information and clarifications should be directed.

All POs must be entered with a valid recommended vendor name. Entering a PO without a recommended vendor is not permitted. "GSU Default Vendor" should be used for competitive bids when the vendor is not known.

The requestor should enter the following information into Panther Mart:

- An exact destination to which the materials should be delivered. i.e., the campus building and room number.
- The location where the materials will be housed or used. This is also the location that should be shown in Panther Mart in the Schedule Section for each line.
- The date by which the materials are required (allow sufficient time for PO processing, bidding, etc.)
- A detailed description of each item (include catalog and I.D. numbers if available).
- The quantity, unit, and price of each item.

Note: Equipment valued over \$3,000 must have the appropriate category code selected to assign the correct asset profile within Panther Mart/Spectrum and must be tagged by Property Control. Items valued over \$5,000 are considered capital assets and will be tagged and depreciated accordingly.

The use of such shortcuts as 'See Quote' or generic line items such as 'Printer' are not

acceptable. The requestor should furnish the following information as background information:

1. Additional Recommended Vendors, if applicable, with address, telephone, and fax numbers - this should include all vendors that the requestor contracted in getting prices for this request
2. Any available additional description or details of the items requested. Include things such as catalog pages, vendor quotes or web page printouts.
3. Attach any quotes or other documentation that a vendor or vendors may have supplied.
4. Attach any pre-approval documentation, licenses, and so forth.

Approval for the PO must be secured as required by the purchaser's departmental policy. This will be done by automatic workflow routing to the required approvers in Panther Mart.

Use the PO number when inquiring as to PO status. All departments have the capability of checking the PO status through Panther Mart. The Purchase Order history tab provides all information related to the status of the order.

Upon receipt of items, the department should inspect all deliveries and verify the quantities received match the quantities ordered. Items should be reviewed to ensure quality standards meet the specifications (brand, model, etc.) provided on the Purchase Order.

Receipts should be completed within Panther Mart to insure timely payment of invoices. Suppliers should send all invoices directly to the Office of Disbursements. In the event the department receives the invoice, date stamp the invoice and forward it immediately to the Office of Disbursements. Payments must be processed within State of Georgia standard payment terms of Net 30 unless predetermined discounts are offered.

Note: Receipt by the department of a PO number **does not** constitute authority of departmental personnel to contact vendors and initiate the purchase. All vendor contact, bidding, purchasing, and other activity associated with an approved, processed, and numbered PO that has been delivered to Purchasing must be handled by Purchasing unless the department is specifically, and on a case-by-case basis, instructed by Purchasing that they should become directly involved (e.g. clarifying specifications, or taking part in a premises inspection).

Payments that exceed purchase order amount:

There is an overage tolerance of 5% or \$500 (whichever is less). If the overage is more than the tolerance, the voucher will create a match exception which has to be approved by the department.

If the payment is tied to a contract and the overage is more than 10% or \$250,000.00 (whichever is less) within a twelve month period, a contract amendment is needed.

Procedure 1-00- 14.31P - Entering a PO

[Panther Mart procedures outline the steps needed to enter a PO into the Panther Mart system.](#)

Procedure 1-00- 14.32P - Forwarding Related Information to Purchasing.

All required documents (other than those requiring original signature) should be attached to your Purchase Order in Panther Mart.

Note: For orders requiring competitive bids (over \$25,000, not on contract) complete specifications should be attached. Specifications should be in a Word format and emailed to the appropriate Procurement Specialist.

Policy 1-00- 15.1 - Purchase Orders

Purchase Orders are issued by the Purchasing Department. No other University Department is authorized to issue official University Purchase Orders.

Departments shall not forward PO numbers to vendors, nor should they forward Purchase Orders that the Panther Mart system has assigned to any vendor. The placing of an order is handled exclusively by the Purchasing Department.

Policy 1-00- 16.1 – [Service Provider \(Consulting\) Agreements](#) (Click Link)

All contracts involving the University as a party, regardless of amount, except (1) research proposals and contracts (handled by the Office of Sponsored Programs) and (2) those using approved and unmodified standard contract forms (i.e. Standard Commercial Solicitation Agreement) must be routed to and approved by the Office of Legal Affairs prior to signature.

University units/departments seeking to hire outside consultants/independent contractors should follow the instructions found in the Finance & Administration document entitled, "Payments to Independent Contractor/Consultants."

Note: Contracts should be routed to Purchasing for review prior to going to Legal Affairs. Purchasing will review and route to Legal Affairs.

Policy 1-00 17.1 - Sole Source / Sole Brand Purchases

Sole-Brand Purchases

A Sole-Brand solicitation is a competitive solicitation which includes specifications restricting offered goods to a specific manufacturer or owner's brand. Before deciding that only one specific brand of goods will meet GSU's critical business requirements, research must be conducted to determine if other brands exist which can also satisfy procurement requirements in a timely manner. Sound procurement practice requires that a Sole-Brand solicitation be used only when it is the last justifiable option, and not as an attempt to contract for a favored brand of goods. An example of the appropriate use of the Sole-Brand justification may include certain situations where a specific piece of equipment is needed to match existing equipment or is a replacement. If the desired good is only available from one source, then the Sole-Brand solicitation is not applicable, and the purchase should be handled following Sole-Source requirements.

A valid Sole-Brand justification allows the procurement professional to process a competitive solicitation with the insertion of "No Substitute" after the good is specified by brand name, model number, or some other designation identifying a specific good of a manufacturer.

To submit a request for a Sole-Brand solicitation, Departments must first complete form [SPD-PS019 Sole-Brand Justification Form](#). Purchasing will post the completed form as an attachment with the solicitation. A Sole-Brand solicitation is a competitive solicitation, and the procurement professional must comply with all other requirements regarding posting and processing a competitive solicitation.

Procedure

Sole-Brand justification will be acquired from the department and should state why the particular item is needed and why no other brands/models will be acceptable.

- **Proposed Source:** Provide the name and telephone number of the supplier (service) or manufacturer (item).
- **Scope of Work:** Provide information to establish the context of the Sole-Brand, for example, the function of the item or service. Indicate where and how the item or service is to be used, operational environment, previous experience, or history, etc. Use plain language to identify any efforts made to locate other possible sources such as review of Thomas Register, Industry Organizations, Internet searches, Consultants, RFIs, Procurement Specialists Laboratory, Advertisements in Industry Publications, contact with Procurement Specialist, etc.
- **Sole-Brand Justification:** Some requirements may need to be provided by a certain manufacturer (for example: "to match existing uniforms"). Use this block to explain why only a particular style, type or manufacturer is acceptable. A request for "Sole-Brand" does not eliminate bidding requirements, as the item may be available from more than one supplier.

Sole-Source Purchases

Based on market analysis, departments and purchasing may determine only one supplier can provide the needed goods or services. This is referred to as a Sole-Source purchase. Sole-Source purchases must be distinguished from Sole-Brand purchases in which more than one supplier can provide the specific item.

Justifying Sole-Source Purchases

For purchases with a value of \$25,000.00 or more, Sole-Source purchases are prohibited unless the department establishes justification why the needed goods or services should not be procured through open competition. Any additional information that the Department has that will help them make the case that an item should be so designated should be forwarded with the form to Purchasing. Sound procurement practice requires that a Sole-Source purchase occurs when it is the only option and not as an attempt to contract with a favored service provider or for a favored good. Departments must complete form [SPD-PS020 Sole-Source Intent to Award Justification](#). Purchasing will publicly post the Sole-Source Intent to Award form for five (5) business days.

Note: For commodities, departments must also obtain and submit a Sole-Source letter from the original equipment manufacturer.

In the event other vendors do not successfully /protest the Sole-Source determination, GSU Purchasing will proceed directly to contract award. GSU Purchasing must post a Notice of Award to the [Georgia Procurement Registry](#), indicating the contract award amount.

Departments must use the current Sole-Source/Sole-Brand Forms to request a Sole-Source/Sole-Brand designation.

Each Sole-Source/Sole-Brand request is unique and must have original signatures. The use of generic statements, pre-filled forms, and/or photocopies of previously provided forms is not an acceptable practice.

Procedure 1-00- 17.1P Sole Source / Sole Brand Form

Department will fill out the Sole Source / Sole Brand form online at the Purchasing Web Site. When completed, the form along with additional materials verifying the request should be forwarded to Purchasing.

Policy 1-00- 18.1 - Used Equipment

The purchase of Used Equipment is permitted in many cases but requires additional documentation and review.

Procedure 1-00-18.1P - Purchase of Used Equipment

When making a request to purchase used equipment, the following statement must be typed on the PO or attached thereto: "Departmental personnel have personally examined this used equipment and

determined that the condition of the equipment is as represented. The department will accept full responsibility, and the best interest of the State of Georgia will be served by the purchase of this used equipment."

POs that include used equipment must include the items serial number(s) for any used equipment, along with brand and model numbers. Where the make and model of the used equipment is currently available as "new in the marketplace," a statement indicating the 'new' retail price and the resulting savings to the state by purchasing the used item must be included with or on the PO. Where the item is no longer available in the marketplace, a statement to that fact must include the original retail pricing as well as a statement as to why no other currently available equipment is suitable.

Policy 1-00-19.1 - Return of Equipment or Supplies

It is the responsibility of the department to determine the suitability of a purchase prior to issuing a PO. Purchasing personnel stand ready to help in this process as needed. While some vendors may be willing to accept a return of merchandise after an order is complete, many are not. Those who do take returns may charge a 'restocking fee' that would mean that you get only a portion of your funds back in your account. Whether or not payment has been made to a vendor can further complicate the prospect of getting your funds returned.

Departments are encouraged to contact the Purchasing Department as early in the process of determining their needs as possible. The more information that is gathered on the front end and the more aware that your Procurement Specialist is of your needs before a PO arrives in Purchasing, the more likely you are to be satisfied with the end result of the Procurement Specialist's action on your behalf.

Procedure 1-00-19.1P - Return of Equipment or Supplies

When it is determined that equipment or supplies should be returned, the originating department should contact the Procurement Specialist involved. The Procurement Specialist will contact the supplier and will handle all correspondence and details. Any correspondence you may have regarding the purchase should be forwarded to Purchasing.

Policy 1-00- 20.0 Commodities requiring Pre-approvals / Special Handling

The department must determine if the goods or services that they are requesting require pre-approvals or if special handling is required. Whenever possible pre-approvals should be completed prior to the entry of PO's into Panther Mart. Special Handling requirements may require additional steps be taken and/or additional documentation be supplied by the Department.

Policy 1-00- 20.0P – Information Technology (IT) Purchases

All IT Procurement requests are subject to review by the Information Security Office to ensure compliance with all standards and procedures outlined in the **University Information Systems Use Policies**.

Requestor completes the IT Procurement Review Form in Panther Mart and submits it electronically to the Office of the Associate Provost for Information Systems & Technology/CIO for initial processing and assignment of the ITPR Review Number.

The requestor is responsible for understanding when a legal review is required. If in doubt, contact the Legal Department at (404) 413-0500. If the requestor wants IS&T to forward any contracts, agreements, licenses, etc., to the Legal Department, documentation must be included when submitting the ITPR form. **In order to expedite technology purchases, the requestor should forward documents to the Legal Department for review when applicable.**

Contracts, Agreements, Licenses, etc., in any amount that require the signature of an authorized representative of Georgia State University, must be reviewed by the Legal Department. This includes renewals.

IT Procurement Review forms more than \$250,000 require the signature of the VP of Finance and Administration. Any other document representing a valuation of \$25,000 or above that requires a signature must be signed by the VP of Finance and Administration. Those documents representing a valuation of less than \$25,000 that require a signature may be executed by the individual with delegated authority for your college or VP area.

Policy 1-00-20.10 Service Maintenance Agreements

Each department is responsible for requesting maintenance agreements for its equipment. Requisitions or quotes should be forwarded to the Purchasing Department at least sixty - (60) days prior to expiration of the current maintenance agreement. The Purchasing Department is responsible for processing equipment service agreements as requested.

Maintenance agreements at Georgia State University run for a one-year period. Maintenance agreements are not automatically renewable. Departments can start a maintenance agreement at any time. Normally, the cost is prorated over the fiscal year and may require a pre-maintenance inspection if the equipment is not under warranty. The warranty may also be renewed at the beginning of the next fiscal year to avoid a lapse in service coverage through issuance of a PO.

It is advantageous to cover certain equipment under a service maintenance agreement. A maintenance agreement is a formal agreement with a company to provide repair service to covered equipment for a specified rate. Generally, maintenance agreements cover all labor charges and some charges for parts used in the repair of covered equipment.

Procedure 1-00-20.11 Service Maintenance Agreements

Requisitions for service maintenance agreements must be completed as follows:

The end-user obtains a maintenance quote from the OEM provider of choice. The quote should include:

Contact Name and Phone Number of Department Personnel

Length of the contract.

Georgia State University property number (orange decal or white bar code decal)

Manufacturer and name of equipment (e. g. Hewlett Packard/Printer)

Model Number

Serial Number

Location of equipment (building and room number)

When terms and conditions have been reviewed by Legal Affairs, the department and the vendor should sign the terms. The department will then issue a requisition in PantherMart and attach a copy of the signed contract for Purchasing to process.

Copier Maintenance Agreements

Copier maintenance POs require a quote from the OEM provider. All quotes that contain terms and conditions must be routed through Legal Affairs before a purchase order is issued. Once the terms and conditions are reviewed and signed by the department and the vendor, Purchasing will issue the purchase order on behalf of the department. The department will not enter a requisition in PantherMart for copier maintenance agreements.

If your equipment is currently under contract, please reference the current contract number and/or PO number.

Note: Any terms and conditions submitted by the vendor must be reviewed by Legal Affairs before a purchase order is issued.

All the requested information is necessary to ensure efficient and accurate handling of your maintenance needs. Omitted information may result in delays of maintenance coverage.

Procedure 1-00-20.12 - Equipment Repair

Individual departments are responsible for making requests for equipment repair.

When calling a vendor for equipment repair, provide the following information:

- Georgia State University inventory number of the equipment to be repaired or the equipment ID number if the equipment is covered under the insured maintenance.
- A general description of the equipment (i.e., typewriter, correcting Selectric, IBM, etc.).
- Location of the equipment (department, building, and room number).
- A brief explanation of the problem.
- A departmental contact the service technician should ask for when they arrive.
- A telephone number at which the vendor can reach someone in the department for further information.

While most repairs can be accomplished on campus, some repair activities require shipping items to an off-campus repair facility. Items such as stopwatches, calculators, and small hand tools are usually shipped to the repair company for servicing. Contact the Purchasing Department for assistance with the pickup, shipping, repair, and return of such items. The cost of shipping as well as the repair will be charged to the requesting department's supply budget.

Procedure 1-00-20.14P Charges for the Repair of Equipment

All costs incurred from the repair of equipment are charged to the repairs and maintenance account (715102) of the requesting department. Repairs that will cost more than \$25,000.00 require a PO. Most repairs of scientific and laboratory equipment will require a sole source justification to be submitted to the Purchasing Department before repairs can begin. If the equipment that requires repair is general office equipment or refrigeration equipment, a competitive bid may be necessary to ensure that a reasonable price is obtained.

Policy 1-00- 20.15 - Vehicle Purchases

University vehicles must be purchased from State Contracts and require pre-approval by DOAS Fleet Management, OPB, and the Board of Regents. Contact the Procurement Specialist for details on the most current contracts and regulations.

Policy 1-00- 20.16 - Vehicle Rental

State contracts are required for vehicle rental. The use of rental vehicles for business travel is governed by [Statewide travel regulations](#).

Policy 1-00- 20.17 - Furniture Purchase

Departments should utilize existing State contracts for the purchase of furniture. Departments who need additional assistance in purchasing furniture should contact the appropriate Procurement Specialist in the Purchasing Department. Many furniture manufacturers require Purchase Orders to be sent directly to them and list the local dealer of record on the Purchase Order. When selecting your furniture vendor make sure to reference the State Contract to determine whether the PO should be sent to the dealer of record or directly to the manufacturer.

NOTE: The policy on furniture purchase applies to all methods of purchase, including PCard and Payment Request Forms.

NOTE: Many furniture purchases will include installation and/or direct delivery to departments. Departments are responsible for notifying the Procurement Specialist in a timely manner when this is the case so that the materials can be properly received, and payment made within the Governor's 30 pay directive.

Policy 1-00- 20.18 - Office Supply Purchases

Office supplies and other regularly used items may be purchased from the current Statewide contract.

Policy 1-00- 20.19 - Photocopy Lease or Purchase

All photocopiers acquired by purchase or lease using University funds must be purchased using the DOAS Digital Copier Contract. This contract is mandatory for all State of Georgia agencies.

Note: Copiers valued at \$2,000.00 or less must be purchased not leased.

Procedures 1-00- 20.19P - Photocopy Lease or Purchase

To purchase or lease a photocopier, a PO must be submitted via the Panther Mart system.

The PO for the purchase of a copier must include:

- *Category - 84331, 74311 or 74320 (depending on the price of the equipment.*
- *A description of the copier including make, model and accessories.*
- *The number of copiers requested.*
- *Price of the copier.*

The PO for the lease of a copier must include:

- *Category - 71912 (this category is subject to change)*
- *The length of the lease agreement (i.e. - 24 months, 36 months, etc.)*
- *A description of the copier including make, model and accessories.*
- *The number of months in the fiscal year the copier will be leased (i.e. - if the PO is issued in February, then the lease will be set up for March through June, 4 months).*
- *Monthly lease price of the copier.*

Copier Renewals

Copier renewals are handled through Panther Mart using the Copier Renewal Request Form. This form should be completed no later than 30 days prior to your lease renewal.

Copier Returns

Departments should contact the Procurement Specialist to complete a copier pick up letter. The copier pick-up letter must be sent to the GSU vendor representative. Prior to the vendor removing the copier from GSU, the hard drive must be cleaned and/or removed from the copier. Departments should arrange the cleaning and/or removal of the hard drive with the vendor representative.

Contact the appropriate Procurement Specialists if you have any questions related to copier purchases and/or renewals.

Policy 1-00- 20.20 - Business Cards

University funds may be used for the purchase of business cards for administrative employees who, in their contact with the public, represent Georgia State University. The appropriate department head must approve such representation and use of business cards.

Procedure 1-00- 20.20P - Business Cards, Letterhead, and Envelopes

To purchase Business Cards, Letterhead, and Envelopes, Departments must visit gsuprints.nowdocs.com and click on "Register as a New User" or sign in if already registered. Once signed in, please click on the "Order Official Georgia State University Stationery" icon, and follow the steps of the ordering process. A departmental speed type (aka speed code) is the exclusive payment method for business cards and is required to complete the ordering process.

Policy 1-00- 20.21 - Printing Services

Printing services that are \$24,999.00 or greater are subject to competitive bidding and/or use of a valid Statewide contract. Printing services of less than \$24,999.00 may be purchased from the University print shop or from an outside vendor. All print jobs must have artwork that is ready for presentation to a vendor. Artwork may be obtained, for a charge, from University Relations or an outside design firm. Print vendors may not design a print job and then provide the printing. Both services must be kept separate.

Procedure 1-00- 20.21P - Purchase of Printing Services

The University printing and copy services are available for printing jobs under \$24,999.00. Departmental credit cards may be used to purchase these services from the University printing and copy services vendor. Requests for other printing, if \$24,999.00 or greater, must be submitted on a Requisition and should be submitted at least 30 days in advance of required completion dates since bidding may be required and average printing time is ten working days. In addition, the Requisition should contain complete and detailed specifications of the printing required.

Policy 1-00- 20.22 - Electrical Equipment

The approval of Facilities must be obtained before the purchase of Electrical Equipment. See Facilities.

Policy 1-00- 20.23 - Film / Video Rental

Film and Video Rental may be managed by the Department if \$24,999.99 or less. If the rental involves the signature of a rental or lease agreement, Legal Affairs must review the agreement in advance.

Policy 1-00- 20.24 - Nuclear Materials

The purchase of Nuclear Materials must have the pre-approval of Environmental Health and Safety. Consult Environmental Health and Safety for details on managing the purchase of Nuclear Materials.

Policy 1-00- 20.25 - Purchase of A/V Equipment that require Installation

The installation of A/V Equipment that requires installation, i.e., attachment to GSU infrastructure and/or the piercing of infrastructure for cable runs, etc. will be handled as an FMR.

Departments, once they have their requirements in hand, should contact Design and Construction Services for details on the FMR process.

Once an FMR and Project Number have been assigned, DCS will coordinate the purchase and contact Purchasing as needed.

Policy 1-00- 20.26 - Construction, Additions, Renovations

Construction, Additions and Renovations should be handled through Design and Construction Services using an FMR.

Policy 1-00- 20.27 - Carpeting Purchase and Installation

The purchase of carpeting and its installation should be handled through Design and Construction using a Facilities Modification Request (FMR).

Policy 1-00- 20.28 - Building Maintenance Service

Building maintenance services are handled by Facilities. Any purchase of these services should be routed through them.

Policy 1-00- 20.29 - Disposal of Hazardous Materials

The Disposal of Hazardous Materials is handled by Environmental Health and Safety. Contact them for details. Once they have assessed the requirements, they will contact Purchasing is necessary.

Policy 1-00- 20.30 – Emergency Purchases

In accordance with (O.C.G.A.) Section 50-5-71, SPD has granted the authority to state entities to purchase urgently needed items arising from unforeseen causes, including, but not limited to, extreme weather conditions or official declared emergencies. Emergency purchases are an exception to the Order of Precedence. An emergency procurement is managed outside of the normal competitive process because of the urgency of the circumstances, such as the immediate welfare of the general public. Therefore, SPD approval is not required in advance of the emergency purchase. Poor planning or the pending expiration of funds does not constitute a valid justification for an emergency purchase. It is always good business practice and considered to be in the best interest of the state of Georgia to make any procurement as competitive as time permits. Georgia State University is authorized to manage the

emergency purchase whether or not the dollar amount of the emergency purchase falls within our delegated purchasing authority.

Departments will contact GSU Purchasing the next business day after the purchase and will provide justification for the emergency purchase. The CUPO must provide SPD with written notice and justification by completing form SPD-NI004 Emergency Justification Form. The completed form must be forwarded by the CUPO via email to processimprovement@doas.ga.gov within five business days of the emergency purchase. A copy of the PO and all pertinent documentation relating to the purchase transaction should be forwarded to processimprovement@doas.ga.gov as soon as possible but no later than five business days following the state entity's final payment or receipt and acceptance of the goods/services, whichever occurs last. There are additional requirements in the event a P-Card is used as noted in the GSU's Purchasing Card Policy. In the event of an emergency purchase, the CUPO is required to provide notice and justification to SPD whether or not the dollar value of the emergency purchase falls within GSU's delegated purchasing authority.

Policy 1-00- 20.31 - Signature Requirements

All documents that require signature must be reviewed in advance of being signed. Only authorized signatories may sign. The signing of un-reviewed documents or the signing of any documents by an unauthorized person could make that individual personally liable for the obligations created.

Policy 1-00- 20.32 - Insurance Requirements

Installation, Delivery of Equipment and other situations where vendors or vendor representatives must come on the University Campus may require that the vendor provide an Insurance Certificate in advance.

Departments should contact Risk Management for details.