New Punch-Out Catalogs Added to SRM

A new punch-out catalog for CDW-G was added to SRM on November 18. Along with Dell and MoreDirect, CDW-G is a University contract supplier for computing peripherals, software, and accessories. A punch-out catalog is also planned for loading for MoreDirect during December. Punch-out catalogs for Apple and scientific contracts are planned for loading in spring 2014. Further information will be forthcoming on the news section of the Purchasing home page.

The Dell punch-out catalog was added to the Supplier Relationship Management (SRM) system on October 1. All items available to academic campus departments from Dell are accessible via the punch-out catalog. Quotes for customized orders are created manually by Dell sales representatives and loaded onto the punch-out website for ordering by departments as needed.

As they become available, the punch-out catalogs should be used for all orders from the above suppliers regardless of dollar amount, with the exception of College of Medicine, Hospital, and Facilities units. These areas will continue to access and purchase items through the e-Buy site.

Training and support materials for the punch-out catalogs and other SRM-related topics can be found on the Purchasing website at: http://www.uky.edu/Purchasing/SRM.htm.

Customs Broker for Overseas Shipments

Does your department purchase equipment or materials from overseas sources? The University has a customs broker agreement with Walter Meuter Customs Brokers Inc., Louisville, to execute and manage overseas shipments into the US. Departments provide Meuter with general information on the shipment, copy of the purchase order or pro-card order, pickup and delivery locations, and supplier contact information. The customs broker will manage details of the entire shipment from origin to departmental delivery point. They will pay the customs and related fees during the process and bill the department for cumulative charges for services after delivery. Typically, the actual shipping charge is paid to the supplier as part of the purchase transaction rather than the customs broker. The Customer Service Representative for Meuter is Heather Hick, phone 502-380-9111, email: hhick@wfmeuter.com. The responsible contracting officer in Purchasing is Becky Purcell, phone 257-5479, email: rpurcell@email.uky.edu. SRM Shopping Cart or ECC Requisition is the correct method for purchase of customs broker services.
Alternative Fuel Vehicles and Department of Energy Compliance

Recently the University was notified by the U.S. Department of Energy (DOE) that we are required to comply with DOE’s Alternative Fuel Transportation Program. The University’s participation in the program has begun and applies to all vehicles (vans, trucks, and passenger cars) ordered during model year 2013 and received after September 1, 2012. The program requires that a minimum of 75% of vehicles purchased on an annual basis must be “Alternative Fuel Transportation Vehicles (AFV).” Click here to read more.

Purchase of Promotional Items

Remember that any imprinted promotional items must be purchased from vendors holding a licensing agreement with Collegiate Licensing Company (CLC). CLC is the University’s licensing partner and is charged with worldwide regulation, promotion, and protection of the University’s name and identifying marks. As part of their agreement, CLC license holders are also required to provide liability insurance coverage for their products and ensure their items are produced in labor law-compliant environments. A vendor without a licensing agreement cannot legally imprint any marks originating from within the University onto physical products. Additional information can be found on the Purchasing Division website at: http://www.uky.edu/Purchasing/promoitems.htm. The responsible contracting officer is Wendy H. Brown, phone 257-5404, email: wendy.holland@uky.edu.

Delivery of Ricoh Ink and Toner Supplies via OfficeMax

Ricoh-USA has partnered with OfficeMax for delivery of ink and toner supplies purchased through the Managed Print Services (MPS) program. Since OfficeMax manages the sole desktop delivery system on campus, the new process will allow departments to receive ink and toner supplies more quickly and delivered direct to their offices. Departments continue to order ink and toner supplies from Ricoh-USA as normally and may use procurement card for these purchases. Product delivery by OfficeMax truck and personnel direct to ordering parties is the only process change. This relates only to ink and toner purchased for department-owned equipment; Ricoh will continue to manage toner delivery for devices on the MPS program.

SAP Vendor TIPS

If you have a remittance address that needs added to the vendor database in addition to a vendor’s ordering address, please send the request and relevant information to Jody Reed (jreed@email.uky.edu). Include the original vendor or W-9 form with your request since it contains needed tax ID information.

Remember to use only vendor-based Transaction Codes (T-codes) when searching for vendor information in SAP. XK-03 is the correct T-code to Display Vendor information (T-codes with the XK prefix are vendor-oriented). T-codes outside the XK-prefix format (e.g., FBL1N, etc.) are not vendor-oriented and may not display full vendor record information.

Remember to perform an exhaustive search for a vendor name before asking the supplier to complete a new vendor form. Both the June and September 2013 newsletters contain information and tips regarding vendor searches. Remember to use search criteria that is most unique to a vendor (e.g., tax ID number, street address with postal code, etc.) to produce the most accurate results.

December 2013
Furnishings Standards for University Hospital, Clinic, and College of Medicine Areas

Furnishings purchased for Chandler Medical Center and clinic areas are subject to HealthCare Facilities Standards policy. The College of Medicine (COM) also adheres to specific standards for furniture purchases. These areas are generally standardized for the exclusive use of Steelcase furniture. Even within the Steelcase product line, only specific series, colors, and finishes are permitted for use within these areas. Hospital, clinic, and COM areas considering purchase of furniture should consult the appropriate parties below for guidance and direction as the first step in the purchase process.

Contact Information:

Hospital areas: Judy Pelfrey, Manager Senior, Healthcare Facilities Planning, 859 323-8274, jlpelf0@uky.edu

Clinic areas: Jennifer Christmann, Director Assistant, HealthCare Facilities Planning, 859 257-2773, jennifer.christmann@uky.edu

College of Medicine: Ann Emmerson, Facilities Operations Director, College of Medicine, 859 323-0008, ann.emmerson@uky.edu

Reminder: SAP R/3 Upgrade December 7-9, 2013

The Enterprise Applications Group (EAG) will perform an upgrade of the SAP R/3 system beginning at 8 a.m. on December 7 through 8 a.m. December 9. The myUK Portal will be unavailable during this time. Few, if any, changes should be experienced within the procurement portion of ECC or SRM as a result of the upgrade.

Business Procedures New Requirement: Employee or Independent Contractor

Departments should become familiar with the new policy change related to BPM E-7-3 Worker Classification: Employee or Independent Contractor. The policy has been revised to help ensure the appropriate classification of a worker as either an employee or independent contractor. The new policy formalizes the evaluation process with the department completing the form and Human Resources Compensation determining the appropriate classification. Policy Highlights:

- Department hiring officials will complete the new form, Worker Status Evaluation Form prior to retaining an individual for services. The form can be prepared for an individual or for periodic services during a fiscal year of one worker type such as editors, proofreaders, or visiting speakers.
- HR Compensation will review form and recommend the appropriate classification.
- Departments will then either process payroll action or complete the Independent Contractors/Client Scope of Work Form and generate appropriate payment document type. (Either PRD or Shopping Cart/Requisition as listed in the Purchasing/AP Quick Reference Guide).
- Departments will attach the Approved Worker Status Evaluation Form to each PRD or Shopping Cart/Requisition.

Please review and plan to implement the Employee or Independent Contractor policy change. Effective Date for the policy was December 1, 2013.
Other Recent Changes to Business Procedures Manual

Departments should be advised of the following recent changes to the Business Procedures Manual per Office of the Treasurer:

B-3-2 Delegated Procurement Authority for University Departments

Employees seeking reimbursement for supplies purchased by personal funds must now complete a new form, Request for Employee Reimbursement and Invoice Form (other than Travel Expenses). The form will serve to document business purposes of expense as well as provide employee information to ensure payment to correct individual. The scanned version of the form with receipts will be attached to the PRD.

B-3-2-2 Payment Request Document (PRD)

- Under Dues for Institutional Memberships on page 3, added sentence to indicate warehouse wholesale memberships such as Costco and Sam’s Club are not authorized. Neither accepts the University VISA procurement card for in-store purchases and based upon Purchasing's review of pricing, the savings was considered insignificant compared to the membership cost. Please direct questions to Naomi Emmons, email: nemmo2@uky.edu, phone 257-1555.

- Section added on record retention to explain the method to scan documents and attach to the PRD. The scanned attachment stored in the Enterprise Content Management system (ECM) will serve as the record copy as defined in the State University Records Retention Schedule, record series U0239 or U1800 for charges posted to grants. Since departments can access the record copy through ECM, departments may destroy originals after the verification of the invoice posting in accordance with BPM E-17-6.

Who/What is the Purchasing Division?

The Purchasing Division, as delegated by the Board of Trustees via the Executive Vice-President for Finance and Administration, is charged with all procurement functions for the University. Under the direction of William Harris, Chief Procurement Officer, the division is responsible for procuring all goods and services for the University, including Capital Projects, usually exceeding $500 million of purchases per year. The division’s staff of 25 employees comprises four purchasing teams, each having contracting officers, senior price contract coordinators, and a manager. The Facilities Team is located in the Peterson Service Building and focuses primarily on purchases for the two Physical Plant Divisions, UK Stores, Capital Projects Management Division, and other needs related to facilities and infrastructure. A Healthcare Team is located within the Chandler Medical Center and executes patient care purchases. The remaining two teams reside within Central Purchasing in the Peterson Service Building and perform procurement for general academic campus needs and non-patient care needs for the hospital. Other staff persons serve in various positions including Administrative Staff Officer, procurement card coordinator, IT Technical Support Specialist, and Materials Management roles within the Enterprise Applications Group (EAG). The majority of staff is cross-trained in multiple contracting, technical, and clerical roles to ensure continuous service to departments, units, and areas.
Under direction of William Harris, several strategic cost-savings initiatives have been implemented on behalf of the University over the past several years. The Office Supplies Containment Program reduced and streamlined the inordinately high number of different office supply products purchased by the University to gain economy-of-scale savings. The Ricoh Managed Print Services (MPS) agreement combined all print and copy needs internal to the University under one supplier, and is on course to campus-wide estimated savings of $22 million during the first six-years of the agreement. The University has transitioned to e-procurement with implementation of Supplier Relationship Management (SRM), taking advantage of suppliers’ web-based catalogs, automatic purchase order processing, and electronic invoicing. Bill also served as the 2012-13 President of the National Association of Educational Procurement (NAEP). NAEP, having over 1500 college and university institutions, is the foremost association working to serve the needs of procurement in higher education.

From everybody in the Purchasing Division, we wish you a safe and happy Holiday Season!