

Purchasing Connections



A bi-monthly publication providing the latest information, best practices, and resources for purchasing, eCommerce, PALCard, contract services, and equipment management. Select headers to view respective portal page for more information.

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Purchasing News

Renew Recurring Payment Purchase Orders (Formerly Blanket POs)

Mark your calendars! On May 18th departments may begin creating Recurring Payment Purchase Orders (RPPO) for the upcoming 15/16 fiscal year. Processing requisitions early will help ensure they are established by July 1 and provides a seamless continuation for the purchase of goods and services.

Following are guidelines to consider before renewing or creating a Recurring Payment Purchase Order.

- Check payments against 2014/15 RPPOs. If there were less than two payments, consider paying by PALCard or processing a one-time Purchase Order. Payments (PREQS) are located in the **View Related Documents** tab in the Requisition or Purchase Order.
- RPPOs cannot be created for [UCIBuy](#) suppliers.
- Weekly, monthly, and quarterly services are good candidates for a RPPO.
- For non-service items, review dollar amounts per transaction and the number of transactions. Generally speaking, high dollar amounts and high transaction volume are good candidates for a RPPO.

To create a new RPPO, complete a Requisition. Select the following link for instructions: [Recurring Payment Requisition](#).

To renew existing RPPOs, complete the following steps:

1. Generate a department report of expiring Purchase Orders: KFS > KFS Purchasing Accounts Payable > Custom Document Search > Purchase Orders
2. Use the following search criteria fields:

- **Purchase Order Organization Code**
 - **PO End Date From:** (e.g. 06/30/15)
 - **PO End Date To:** (e.g. 09/30/15)
3. Select **search**. Determine if renewal is appropriate, and complete the following steps:
- Open PO and go to the **View Related Documents** tab.
 - Select the **Requisition** number link which opens the Requisition in a new tab or window.
 - Scroll to the end of the document and select **copy**. Validate all tabs and verify that the following fields are correct:
 - Update the Year by selecting the drop-down menu and change to 2016 (drop-down available starting May 18, 2015)
 - Items tab
 - Accounting Lines (use future funds)
 - Payment Info tab
 - Check box next to Recurring Payment
 - Enter appropriate dates in the **Begin/End Date** field. The begin date must be July 1, 2015 or later. Make sure the end date is 09/30/16—90 days after FY close which keeps Purchase Order open for payment of invoices dated, or services performed, prior to 07/01/16.
 - FY 15/16 RPPOs cannot be paid before July 1, 2015.

Contact Central Purchasing at purchasing@uci.edu or 949.824.4040 for assistance.

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Multi-Year Contracts

If you have a multi-year contract and encumbered funds for one year, an amendment is needed. Select the following link for instructions: to initiate a Purchase Order Amend (POA): [Purchase Order Amend for Contracts](#)

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PO Transmission

It is the Contract Manager's responsibility to validate the correct **Method of PO Transmission** for Purchase Orders. The image below displays three options that appear in the drop-down menu.

* Method of PO Transmission:	<input type="text" value="Manual (non-auto fax/email)"/>
PO Transmission Fax:	Manual (non-auto fax/email)
PO Transmission Email:	Auto Fax Auto Email

1. **Manual (non-auto fax/email):** Contract Managers are responsible for physically completing the task of faxing or emailing the PO and any associated documents to the Vendor.
2. **Auto Fax:** System automatically faxes approved PO. Contract Manager is responsible for validating the correct fax number.
3. **Auto Email:** System automatically emails approved PO. Contract Manager is responsible for validating the correct email address.

A fourth option, **Manual**, appears if a UCIBuy supplier was selected for a Requisition that was generated outside of UCIBuy. Contract Managers cannot change the transmission method in this scenario, and must manually transmit the PO to the supplier.

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After-the-Fact Purchases

An After-the-Fact purchase is defined as any purchase made by a faculty or staff member without prior issuance of an approved Purchase Order or PALCard transaction, and then an attempt is made to initiate a Purchase Order to pay the vendor invoice after securing the good/service from the vendor.

This practice violates ([BUS-43](#)), as it can create financial liability and risk for the University. All requests for goods/services must start with a department internal requisition (PALCard) or KFS Requisition (Purchase Order).

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eCommerce

Now Available in UCIBuy

PerkinElmer's Hosted Catalog is now live and offers chemicals, reagents, and diagnostic tools for the research community.



For time-specific radioactive isotope orders, contact Tamsen Deckert in Central Purchasing for assistance (tldecker@uci.edu; 949.824.6168).

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Coming Soon

Stay tuned for more information. Hewlett Packard (HP) offers computers, printers and servers.



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PALCard

Documenting Review

Reconcilers are allocated 15 calendar days to review PALCard charges before they auto-post to the General Ledger. All charges must be reviewed within this time frame to keep accounts compliant with policy.

Documentation of PCDO review, occurs electronically in KFS when Reconcilers send charges to the General Ledger before the 15 days expire. When PCDOs are not electronically reconciled in KFS during this time, proof of reconciliation must occur on paper—the Internal Requisition must be dated and signed by the Reconciler (first and last name, no initials), and include the PCDO doc number. The Reconciler's signature provides proof that the charge was reviewed.

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Fiscal Year (FY) Close Instructions

Fiscal close instructions for PALCard (PCDO) Reconciliation, will be distributed to all PALCard-holders and Reconcilers in May.

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Contract Services

Independent Contractor or Consultant

IRS and UC policy require that UCI correctly classify workers based on the services they provide, as defined in [BUS-77](#) and [BUS-34](#).

Independent Contractor: UCI has the right to control only the end result of a service, not the way it is performed. For example: Department hires a company to build a product according to the department's specification. For more information see [How to Process a Service Agreement](#).

Independent Consultant: UCI cannot control either the result of the service or the way it is performed. For example: Department hires a firm to provide guidance and/or recommendations regarding how to improve a process within the department. For more information see [How to Process an Independent Consultant Agreement](#).

Both processes use KFS to communicate with Contract Services. Sign up for training in [UCLC](#) to complete a Business Contract/Agreement Requisition.

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Equipment Management

Uniform Guidance Update

An updated Uniform Guidance (UG) message regarding the purchase of equipment using federal or federal pass-through entity awards, was distributed to the Capital Asset Management mailing list last week. A copy of the email is attached to this newsletter.

Select the following link to sign up for Capital Asset Management updates: [CapitalAssetMgmt listserv](#).

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Training

Instructor-Led Classes

Classes have been added to [UCLC](#) for the months of April, May, and June. Select the following link for a complete listing of days and times: [Training Calendar](#).

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Resources

- Buying Portal
- Purchasing Portal
- Past Newsletters

Training Information

- Purchasing & Capital Asset Training Calendar
- KFS Purchasing Training Guides
- CAM Training Guides