

# Purchasing Updates and Year-End Activities

May 27, 2022



# AGENDA

- Quantity of 1 / Amount Only
- Change Request / Change Order
- Methods of Procurement
  - A. Sole Sources
  - B. Emergencies
  - C. Small Purchases
- Supplier Portal
- Strategic Sourcing
- Unauthorized Procurements
- Blanket Orders for FY22-23
- Closing FY21-22 POs
- Fiscal Year Cutover
- Purchase Order Roll to FY22-23

# QUANTITY OF 1 / AMOUNT ONLY

## Requisitioners









When creating a requisition, PeopleSoft requires you to enter a unit price.

On the checkout page (or Edit Requisition page), each line has an Amt Only checkbox.

### When do you check the Amount Only box?

- Quantity is 1
- Services
- Blanket Orders
- Items grouped together as a LOT

#### Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Amt Only	Details	Comments	Delete
▶ <input type="checkbox"/> 1	 ELECTRICAL SERVICE FOR CABLE D		CASHION ELECTRICIANS INC	<input type="text" value="1.0000"/>	Each	<input type="text" value="6,440.00000"/>	6440.00	<input checked="" type="checkbox"/>		 Edit	
▶ <input type="checkbox"/> 2	 ELECTRICAL SERVICES FOR CABLE		CASHION ELECTRICIANS INC	<input type="text" value="1.0000"/>	Each	<input type="text" value="3,100.00000"/>	3100.00	<input checked="" type="checkbox"/>		 Edit	

# QUANTITY OF 1 / AMOUNT ONLY

Price	Total	Amt Only	Details	Comments	Delete
6,440.00000	6440.00	<input checked="" type="checkbox"/>		 Edit	
3,100.00000	3100.00	<input checked="" type="checkbox"/>		 Edit	

# CHANGE REQUEST / CHANGE ORDER

- Change Requests are defined as changes to existing Requisition lines that have previously been sourced to a Purchase Order.
- Change Requests can be initiated for a Requisition in the current fiscal year, provided its corresponding PO has never been “rolled” during that year.
- If you need to increase the amount of a PO that was created in a previous fiscal year, you will need to create a new requisition and include the text “CO to PO 20000xxxxx” at the beginning of line item description. (e.g., Blanket POs)
- If you need to add a new line item to an existing PO, you can use the same requisition or create a new requisition, but you will also need to follow the “CO” procedure from the previous bullet point.
- Attachments for **new** req lines will be transferred over to the PO. Attachments for already sourced req lines would need to be e-mailed to Purchasing.

# METHODS OF PROCUREMENT – SC LAW

## SECTION 11-35-1510. Methods of source selection.

Unless otherwise provided by law, all state contracts **must be awarded** by competitive sealed bidding, pursuant to Section 11-35-1520, except as provided in:

- (3) Section 11-35-1525 (Fixed Priced Bidding);
- (4) Section 11-35-1528 (Competitive Best Value Bidding);
- (5) Section 11-35-1529 (Competitive Online Bidding);
- (6) Section 11-35-1530 (Competitive Sealed Proposals);
- (8) Section 11-35-1540 (Negotiations After Unsuccessful Competitive Sealed Bidding);
- (9) Section 11-35-1550 (Small Purchases);
- (10) Section 11-35-1560 (Sole Source Procurements);
- (11) Section 11-35-1570 (Emergency Procurements)

# METHODS OF PROCUREMENT – SC LAW

## **SECTION 11-35-1525.** Competitive fixed price bidding.

(1) Conditions for Use. When the procurement officer determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive fixed price bidding subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided for in this section.

## **SECTION 11-35-1528.** Competitive best value bidding.

(1) Conditions for Use. When the procurement officer determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive best value bidding subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided for in this section.

## **SECTION 11-35-1529.** Competitive online bidding.

(1) Conditions for Use. When the procurement officer determines in writing that on-line bidding is more advantageous than competitive sealed bidding, a contract may be entered into by competitive on-line bidding, subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided in this section.

## **SECTION 11-35-1530.** Competitive sealed proposals.

(1) Conditions for Use.

(a) If the procurement officer determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive sealed proposals subject to the provisions of Section 11-35-1520 and the ensuing regulations, unless otherwise provided in this section.

# **METHODS OF PROCUREMENT – SOLE SOURCE**

## ***South Carolina Consolidated Procurement Code***

### **SECTION 11-35-1560. Sole source procurement; public notice.**

Sole Source Procurement is defined as a:

“A non-competitive method of procurement used when only one supplier possesses the unique ability or capability to meet the particular requirements of the entity or because only one supplier is practicably available.”



# METHODS OF PROCUREMENT – SOLE SOURCE

A sole source is where there is only one source of supply, services, information technology, or construction.

- Written justification from the department is required.
- Examples:
  - Where the compatibility of equipment, accessories, or replacement parts is the paramount consideration;
  - Where a sole supplier's item is needed for trial use or testing
  - Where the item is one of a kind
- Notice must be posted in SCBO for 5 business days between \$50k and \$250K
- Notice in SCBO for 10 business days for potential value greater than \$250K
- View Slides 19-23 of the [March 2022 Presentation](#)



**South Carolina**

# METHODS OF PROCUREMENT – EMERGENCY

## Regulation 19-445.2110

### ➤ Condition arises that creates an immediate threat to:

- Public Health/Welfare
- Critical economy and efficiency
- Safety

Examples: floods, riots, epidemics, fire loss, equipment failure or other such unpredictable conditions

### ➤ Need that cannot be met through normal procurement methods and lack of which would seriously threaten:

- The functioning of State government
- The preservation or protection of property
- The health or safety of any person

# METHODS OF PROCUREMENT – EMERGENCY

## Sections 11-25-1570 & 11-35-4210(1) and (1)(c)

- When time permits, multiple quotes are requested
- Written justification from the department is required
- Examples of Emergencies, an immediate threat to
  - (1) public health
  - (2) welfare
  - (3) critical economy and efficiency or
  - (4) safety of any personUnder emergency conditions
- Notice must be posted in SCBO as soon as practicable thereafter with a potential value greater than \$50,000
- Protester must file intent to protest within 5 business days of the date the notification of intent to award is posted.

# METHODS OF PROCUREMENT – SMALL PURCHASES

## Section 11-35-1550(2)

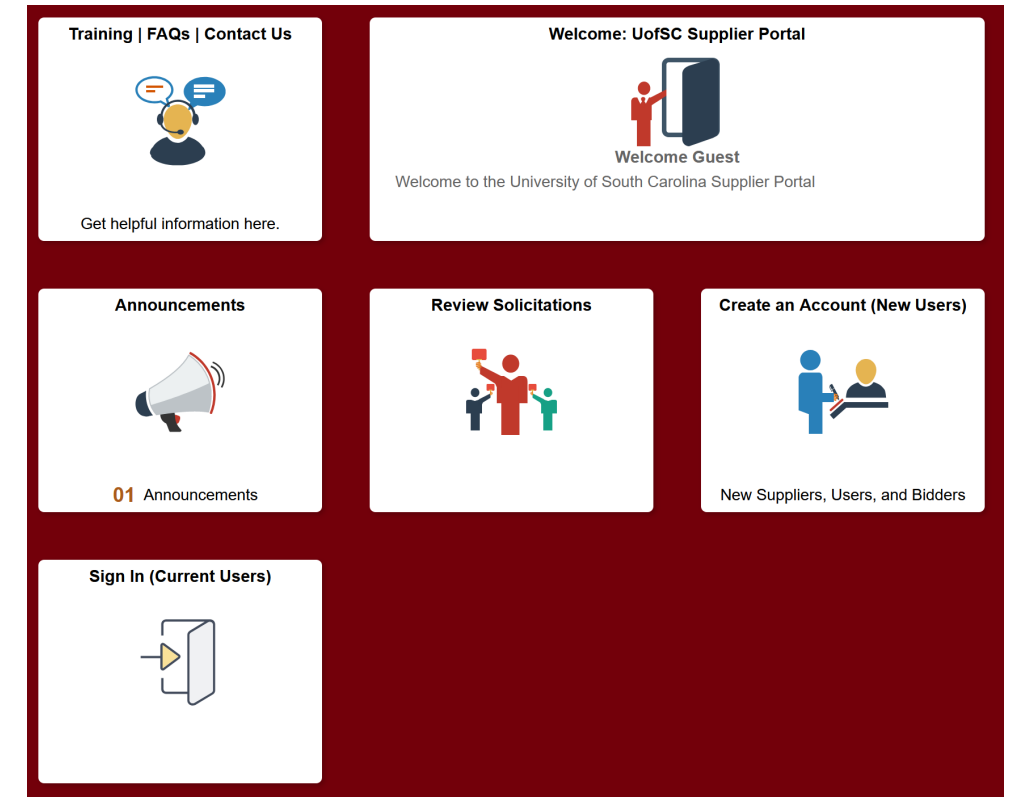
- (a) No Competition – not exceeding \$10,000.00
  - ✓ Price is “Fair and reasonable”
- (b) Three Written Quotes – \$10,000.01 - \$25,000.00
  - ✓ Provided by the requester
  - ✓ Must include solicitation and responses
- (c) Advertised Small Purchase – Not exceeding \$100,000.00
  - ✓ Performed by Purchasing

# SUPPLIER PORTAL

The **Supplier Portal** is the public website where vendors go to review and respond to Purchasing's Solicitation Events, as well as maintain their company profile.

Supplier Portal URL: <https://supplier.ps.sc.edu/>

\*Employees are encouraged to use a unique browser when viewing the Supplier Portal, as the browser will experience a conflict between the EMPLOYEE and SUPPLIER web addresses. This will require a user to clear browser cookies to resolve the conflict.



**Supplier Registration** – A company can register as a New Supplier if there is a guaranteed pending commitment from UofSC to issue a payment or a purchase order.

**User ID** – Contacts for Active Suppliers can obtain a User ID which allows them to sign into the Supplier Portal.

**Bidder/Offeror Registration** – A company should register as a New Bidders if they have no commitment for payment or PO, and they merely want to participate in Solicitation Events.

# STRATEGIC SOURCING

There are two pages that contain a resource to find out which Event ID is associated to a Requisition ID:

- 1) On the **Manage Requisitions** page, right-click on the Requisition ID field, then click the **Event Req XREF** query.

## Manage Requisitions

### ▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	USC01	Requisition Name		
Requisition ID	1000058819	Request State	All but Complete	Budget Status
Date From		Date To	05/19/2021	
Requester		Entered By		PO ID

**Related Information**  
Event Req XREF

# STRATEGIC SOURCING

2) When clicking the **Req ID** or the **Requisition** icon, the **Requisition Details** page will open. You can find the **Event Req XREF** query in the Related Content link in the upper right side of the page.

Requisitions ?

To view the lifespan and line items for a requisition  
To edit or perform another action on a requisition

Req ID	Requisition Name
1000058819	QS-1 Q-Stress ECG


Requester Michelle Carrera

Pre-Encumbrance Balance

Requisition

Approvals

Request Lifespan:

UNIVERSITY OF SOUTH CAROLINA

All Search

Advanced Search

Last Search Results

Requisition Details

Related Content |

Event Req XREF

Requisition Summary

Business Unit

USC01

Date

03/10/2021

Request State

PO(s) Dispatched

Requested For

Approval Justification

SOLICITATION

Requisition Name

QS-1 Q-Stress ECG

Requisition ID

1000058819


FAMIS Work Order

Total Amount

25,100.00 USD

Pre-Encumbrance Balance

5744.01 USD

South Carolina

# STRATEGIC SOURCING

- The Related Content section will open at the bottom of the page.
- The Requisition ID will populate into the query on the Manage Requisitions page if there was already a number entered in that field.
- It will also populate on the Requisitions Details page.
- Click the View Results button to see which Event ID the Requisition ID is associated to, as well more information about the Requisition and Event.

▼ Related Content

Event Req XREF

SC\_SS\_EVENT\_REQ\_XREF\_RC - Event/Req Cross Reference

Requisition ID

Event ID

View Results

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (2 kb)

View All

First 1-4 of 4 Last

Row	Requester Name	Requester Email	Requisition ID	Requisition Line	Event ID	Event Status	Start	Finish	Event Name	Event Line	Buyer Name	Buyer Email
1	Melissa Bair	mattison@mailbox.sc.edu	1000065442	1	220194-01	Awarded	05/18/2022 11:00:00AM	05/25/2022 3:00:00PM	Provide Hawkin Dynamics Force Plates & Accessories	1	Mac Stiles	mac.stiles@sc.edu
2	Melissa Bair	mattison@mailbox.sc.edu	1000065442	4	220194-01	Awarded	05/18/2022 11:00:00AM	05/25/2022 3:00:00PM	Provide Hawkin Dynamics Force Plates & Accessories	4	Mac Stiles	mac.stiles@sc.edu
3	Melissa Bair	mattison@mailbox.sc.edu	1000065442	3	220194-01	Awarded	05/18/2022 11:00:00AM	05/25/2022 3:00:00PM	Provide Hawkin Dynamics Force Plates & Accessories	3	Mac Stiles	mac.stiles@sc.edu
4	Melissa Bair	mattison@mailbox.sc.edu	1000065442	2	220194-01	Awarded	05/18/2022 11:00:00AM	05/25/2022 3:00:00PM	Provide Hawkin Dynamics Force Plates & Accessories	2	Mac Stiles	mac.stiles@sc.edu



# UNAUTHORIZED PROCUREMENTS

## **Regulation 19-445.2015 Unauthorized or Illegal Procurements**

Below is the information needed in the determination of appropriateness.

**How is the decision documented?** All decisions authorized by Sections

A. Decision to Ratify or Declare Void

B. Decision to Continue or Terminate Contract (performance), and

E. Bad Faith of the regulation must be supported by a written determination of appropriateness that discusses

- (a) the applicable facts and circumstances,
- (b) the corrective action taken to prevent recurrence, and
- (c) the action taken against the individual committing the act. Every governmental body must submit a quarterly listing of all decisions made pursuant to these three sections, along with written copies of the determinations. The Materials Management Officer will submit this record to the board annually.

# BLANKET POs FOR FY22-23

## Regulation 19-445.2100.E

- Blanket Purchase Orders are a simplified method of filling repetitive needs for small quantities of miscellaneous supplies, services or information technology and are designed to reduce administrative costs associated with small purchases by eliminating the need for issuing individual payment requests or purchase orders. Think of it as an "allowance" to make purchases with a supplier during a specified time range.
- Blanket Purchase Orders are valid for one year and are closed each fiscal year.
  - A term contract is not a blanket order.
  - A one-year service agreement is not a blanket order.
  - An annual software license is not a blanket order.
- FY22-23 Blanket Orders are allowed on or after **June 6<sup>th</sup>**.
  - These Requisitions must have line descriptions indicating they are **FY22-23** blanket orders, as well as a list of the authorized users of the PO.
- FY21-22 Blanket Orders will close the last week of July allowing for June invoices to process.

# CLOSING FY21-22 POs

- Continue sending requests to close POs to [purchasing@sc.edu](mailto:purchasing@sc.edu).
- If a PO is fully matched and has a \$0 encumbrance, it will be closed, no need to send a request to close.
- Only send requests to close a PO after all invoices have been paid, and no additional invoices are expected.
- Closed POs with remaining funds will be released to the general ledger.
- POs that are not closed and still have an encumbrance balance will be rolled into the new fiscal year.
- Use PO Inquiry to review PO information: *Purchasing > Purchase Orders > Review PO Information > Purchase Orders*

# FISCAL YEAR CUTOVER

- **June 17<sup>th</sup>** @ 12 PM – Requisition period for FY21-22 closes.
- **June 20<sup>th</sup>** – You may begin entering FY22-23 Requisitions.
- After the fiscal year PO Roll processes are performed, all FY21-22 requisitions will have a status of “Complete” meaning they are closed and can no longer be modified.

# PURCHASE ORDER ROLL TO FY22-23

All Purchase Orders from FY21-22 will be rolled into FY22-23 on **Friday, July 8, 2022**. This means:

- All remaining PO encumbrances for FY21-22 will be liquidated and carried forward into FY22-23.
- All requisition lines that were created in FY21-22 will no longer be linked to their corresponding PO lines. The consequences of this is that **Change Requests** for these line items will not be possible. At that point only new requisition lines can be created to create Change Orders for existing POs.

# THANK YOU!

If you have additional questions, please  
send an email to [purchasing@sc.edu](mailto:purchasing@sc.edu)