

# PROCUREMENT SERVICES POLICY 1 METHODS OF PURCHASE

The University of North Carolina at Greensboro

Approved by Paul Forte, Interim AVC for Finance, August 4, 2021

Revised August 4, 2021

## 1. Purpose

This policy describes the methods by which commodities or services are to be purchased.

## 2. Scope

This policy applies to all University employees, departments, units and divisions.

## 3. Definitions and Roles and Responsibilities

### 3.1 Definitions Purchase Requisition

Purchase Requisition- A request from an internal user customer to Procurement Services for the procurement of goods or services from vendors

Purchase Order- A legally binding document prepared by Procurement Services to describe the terms and conditions of a purchase. In the contracting process the purchase order may function as an offer, an acceptance, a confirmation of an oral agreement or a trigger for periodic performance (release) under an established contract.

## 4. Policy

The major factors which determine the manner in which a purchase requisition is processed by Procurement Services include: the nature of the commodity or service to be purchased, its dollar value, and the urgency with which it is needed. Additionally, the use of authorized and proper funds and accounts can affect a purchase.

## **Expenditure Accounts and Fund Coding**

The use of proper Banner Finance fund and account is essential for the correct encumbrance of funds under any purchase.

## **Purchase Requisitions for Purchase Order**

The [online purchase requisition](#) is the departmental authorization for a purchase to be initiated, solicited (as applicable), and consummated as a purchase.

## **PCard**

The University PCard, a corporate liability VISA card, is available to UNCG employees for purchases under \$5,000. A complete description of the PCard policies, procedures and related information is available on this [PCard website](#).

The University encourages the use of PCard through our eProcurement system, "SpartanMart".

## **Methods of Campus Vendor Purchases**

Purchases from intracampus/on campus vendors or campus departments may be made using the appropriate respective Interdepartmental Invoice. Office of the Controller Policy 4 Interdepartmental Invoices and Procedure 4 Interdepartmental Invoices.

Specific purchases of this nature which are of interest follow.

## **Facilities Operations**

All minor construction, building repair and renovations are handled through the Facilities Design and Construction (FDC) Office. Requests for services in this category should be made directly of the Facilities Operations Office, particularly for an estimate of the cost and time involved for commencing and completing the work. If it is determined that the campus department will absorb costs involved, an estimate is made and returned to the campus department. If the campus department desires to proceed with the work after receiving the estimate, a [BanFin59](#) should be completed and submitted to [Facilities Operations](#).

## **Equipment Requiring Utility Services or Facilities Alteration**

Prior to any purchase of equipment requiring connection to utilities (gas, electricity, piped air, etc.) or alteration or modification of a building or property to accommodate the equipment should be coordinated with Facilities Operations.

## **University Bookstore Purchases**

Office and administrative supplies may be purchased from the University Bookstore using the PCard.

Reference UNCG Accounting Services website for complete list of [BanFin and Interdepartmental forms](#).

## **5. Compliance and Enforcement**

The Director of Procurement Services is responsible for ensuring compliance with this policy.

## **6. Additional Information**

### **6.1 Supporting Documents**

- [UNCG PCard Policy](#)
- [UNCG Facilities Operations](#)

### **6.2 Approval Authority**

This policy will be approved by the Interim Associate Vice Chancellor for Finance.

### **6.3 Contacts for Additional Information and Reporting**

- Responsible Executive: Michael Logan, Director of Procurement Services, (336)334-4104, [mflogan@uncg.edu](mailto:mflogan@uncg.edu)
- Responsible Administrator: Richard Fleming, Assistant Director of Procurement Services, (336)334-3078, [rrfleming@uncg.edu](mailto:rrfleming@uncg.edu)