

Purchasing Information/Procedures for CSR/TSGC Faculty, Researchers, Staff and Students

BASIC STEPS FOR UNIVERSITY PURCHASING

First, familiarize yourself with UT's purchasing rules and regulations: <https://afm.utexas.edu/hbp/part-7-purchasing> and the following [flowchart](#).

Purchasing Process:

The university does not allow for employees to personally purchase goods and services and seek reimbursement. You must follow the appropriate purchasing procedure.

Please route all requests through the purchasing@csr.utexas.edu email.

Requests for a purchase must be submitted by email with an account and approval from the Principal Investigator (PI), or through the [Purchase Request Form](#) with the appropriate information and signatures already completed. The purchase cannot be initiated without this information.

The lone exception is any type of purchase request that falls under the scope of IT. These requests are to be vetted and/or scoped by the center's Senior Systems Administrator before being routed to the Purchasing Agent. This is a longstanding campus and Cockrell School [policy](#). These types of requests may include but are not limited to hard drives, software licenses, laptops, and desktop computers. Please email all IT-related requests to techsupport@csr.utexas.edu.

SOLICITATION GUIDELINES:

UT Market

Any current university employee can access UT Market as a shopper. UT Market must be used as the primary source for any office supplies, computer equipment, software, furniture, and other items that can be found in the marketplace. A step-by-step guide can be found [here](#).

UT Market can be found in UT Direct. Look for the orange shopping cart once logged in.

There are two distinct roles involved in a UT Market order: shoppers and buyers.

1. A shopper can browse catalogs for available items, put items in a shopping cart, and assign the shopping cart to another shopper or to a UT Market buyer for review. A shopper cannot check out a cart but must assign the cart to a buyer to complete the order.
2. A buyer can shop, check out the shopping cart, and create a purchase. Once the buyer completes and approves the requisition, the document will route for final approval. The routing path is determined by the account number(s) used on the document. The center's Purchasing Agent is the official buyer for any/all UT Market requests.

Procurement Process for UT Market

1. A shopper shops in the online catalog, adds items to a cart, and assigns the cart to a UT Market buyer. An account name or number is required in the notes of the cart or in a separate email to move forward with the procurement process. If you are not a PI, then you must also provide the approved request for the item.
2. The buyer reviews and checks out the shopping cart from UT Market.
3. **Please note:** Once the cart is checked out of UT Market, no changes can be made to the cart or to the draft requisition. If the requisition is incorrect, the original cart must be deleted, and a new cart must be created and checked out. The buyer will handle deletion of the original cart.

If you cannot find what you need on UT Market, then the center also has an Amazon Business Prime account, the procurement card, or can issue a purchase order depending on the type of good/service or dollar amount.

Procurement Cards

To complete low dollar purchases the center has an authorized procurement card which may be used to complete these types of requests. The transactional limitation for a purchase is \$1,500. If your request is above this limit, please speak with the Purchasing Agent before trying to complete the request to discuss alternate options, including other vendors or a single-use transaction increase.

Please also familiarize yourself with the [Disallowed List](#) as any purchases made with the card for these items or with these vendors may result in disciplinary action that could inhibit our ability to do business.

Specially Designated Nationals List (SDN): **Before** purchasing from any new vendor, you **MUST** check to see if the vendor appears on the [SDN list](#). If it does, (1) you may not make that purchase, and (2) you must report the situation to the Purchasing Agent.

You must complete the transaction log when checking out the card. Please see the Purchasing Agent for the transaction log and the procurement card. Procurement cards can be checked out but cannot:

1. Checked out for longer than two hours.
2. Be kept overnight by anyone who is not the cardholder.

The center is exempt from paying Texas sales tax. A copy of the tax exemption form is provided for your convenience with the procurement card when it is checked out. Vendors outside of Texas are not required to honor our sales tax exemption.

Receipts must be returned to the Purchasing Agent along with the procurement card as soon as you have completed the purchase. You will also need to complete your entry in the transaction log.

Purchase Orders

An email with the following information must be provided to purchasing@csr.utexas.edu to initiate a PO:

1. Description of good or service.
2. Quantity needed.
3. Date needed.
4. Estimated cost.

Once this has been received, then the solicitation of quotes can begin. If needed, the requestor(s) are responsible for providing the three quotes to the Purchasing Agent. Solicitation methods are generally determined by the estimated dollar value of the product or service to be purchased (see chart below). A department may solicit quotes (informal bids) from suppliers for purchases up to \$50,000. Purchases with a value expected to be greater than \$50,000 may require formal bidding by the Purchasing Office.

The State of Texas and the university have access to many competitively awarded contracts that can be used to save time in the purchasing process by removing the need for formal bidding. Local contracts

(those established by the university) and other frequently used contracts can be found on the Purchasing Office [Existing Contracts website](#).

A copy of the Exclusive Acquisition Justification Form (EAJ) with instructions and a sample explanatory EAJ can be found [here](#). For more information about an EAJ, see the Handbook of Business Procedures [7.5.3. Exclusive Acquisitions](#).

Purchase orders must be issued prior to the shipment of a product or the delivery of a service to be compliant with university policy and procedures.

Dollar Range	Solicitation Process	Requisition Type
\$0 – 15,000	Competitive quotes are encouraged but not required. A department may solicit a quotation from a single source and issue a purchase order at the department’s discretion.	PBO
\$15,001 – 50,000	A department is required to obtain a minimum of three quotes by mail, email, or fax and submit them to the Purchasing Office. A good-faith effort should be made to include at least one quote from a minority-owned or woman-owned business. An Exclusive Acquisition Justification Form may be used if appropriate.	PB3 or PB4
\$50,001+	Formal bidding by the Purchasing Office may be required. Consult with a buyer in the Purchasing Office to determine the appropriate procurement method. An Exclusive Acquisition Justification Form may be used, if appropriate. Depending on the type of request, further documentation may be required.	PB4

Business Contracts

You will often encounter vendors requesting signatures on their quotes or providing terms and agreements that must be agreed to in order to continue with the purchase request. **Do not sign anything sent to you.** The university has [“designated signers”](#) who have the authorization to sign off and negotiate these agreements/terms and conditions. Any signature other than one of these designated

signers is considered invalid. No one but the designated signer has the authority to obligate the university to anything.

You must work with the Purchasing Agent to complete the [Business Contract Review Checklist \(BCRC\)](#) accurately. Any edits or revisions done after the BCRC was routed for approval will remove it from the routing and place it back at the end of the line. The Business Contract is a tool that is often used in conjunction with a Purchase Order or in place of in some instances. Please look over [this guide](#) to see the best avenue to begin the request.

As with any other type of purchasing request, you must provide all pertinent information to the Purchasing Agent when initiating a request, including but not limited to quotes, agreements, terms and conditions, and PI approval. All portions are required and any missing pieces will cause your request to stall until all pieces are received.

Software

First, please take some time to read through how the university defines “[software](#).” There are several avenues for completing a software acquisition and these flowcharts help explain them in detail:

- [New Software](#)
- [Renewal Software](#)

Software and the ProCard

Most software procurements are completed via Business Contract or PO, but the university does allow for use of the ProCard to complete purchases dubbed a “[low risk clickwrap agreement](#).” These are defined as procurements with a contract term not to exceed one (1) year and a total contract value less than \$5,000. Use of the ProCard for Higher Risk Services as defined below is not permitted.

Further detailed information about Low Risk vs High Risk Clickwrap Agreements and use of the procard with software can be found [here](#).

Pre-Travel Expenses

All abstract and registration fees must be paid through the center’s procurement card. This is a Cockrell School policy and must be strictly followed. Please contact the Purchasing Agent for the card’s information.

There are a handful of travel-related expenses that are approved for use on the procurement card. They may include goods and services such as publication page charges and poster printing. Use of the procurement card is the University’s preferred method of payment. If you do not use the procurement card for any of these and pay out-of-pocket, they then become a travel reimbursement and cannot be claimed until travel has been completed.

CSR POINTS OF CONTACT

Jason Peck
Purchasing Agent
Office 2.6050
(512) 471-7579
purchasing@csr.utexas.edu

IT Requests
techsupport@csr.utexas.edu

Shauna Pendleton (Backup)
Contract Administrator
Office 2.6072
(512) 471-6891
pendleton@csr.utexas.edu