

# Procurement and Business Services Information

## CBOG September 12, 2019

This update is posted at: <http://www.clemson.edu/procurement/faculty-staff/index.html> under the [Announcements](#) section.

1. **No PO, No Pay:** Since the new policy went into effect in March, we are averaging about 3-4% of transactions being done on the Unauthorized Commitment of Funds form. Ideally that would be great – only 3-4% of payments are being done after the fact with no PO issued up front. However, that number is just too good to be true! In reality, if we look at PO dates issued compared to invoice dates (i.e. we receive an invoice and THEN try to issue a PO that is NOT on the Unauthorized Expenditure form), we are closer to 18-20%. Still an improvement, but it also shows that there are ~15% of transactions people are going to extreme and extra work to try to go around the process! Please promote using the proper process and proper form. For the time being, there is nothing wrong with the Unauthorized Commitment of Funds form – it helps us track behavior AND also helps us get word out to the supplier. When we don't use the right form, we create extra steps and the supplier will continue submitting invoices without PO numbers. Down the road when we get to the point where we are using the Unauthorized Expenditure of Funds as an exception, we may put some more strict rules/approvals around it!
2. **Procurement Code Changes:** On September 3<sup>rd</sup>, University Procurement Policy and related procedures, buyWays forms/workflow, etc... were changed to reflect the new changes put in place earlier this year when the Procurement law was changed. You can find a summary of these changes here - <https://www.clemson.edu/procurement/faculty-staff/policies/procurement/psv21proc.html>. As previously discussed, the two biggest changes for end users are: 1) the increase of the "\$2500" limit to \$10K and 2) the requirement to advertise and Intent to Sole source for sole sources >\$50K.

The increase of the threshold to \$10K means that any purchase of \$10K or less does not require price references, quotes, or other justification. You must still use existing contracts if they cover something you are purchasing <\$10K, but no more "price reference" requirement for those purchases not on contract or exempt from bidding. P-card limits are NOT changing, but if you need to request an increase in your card to make a one-time purchase between \$2500 and \$10K, you do not need to have supporting justification in your file – just request the one time increase using the appropriate form on the website.

Regarding the Intent to Sole Source, the impact is simply that folks need to plan ahead a little more as we can't just rush through a PO/payment. Questionable sole sources will also be pushed to be bid out as in most cases a bid may be the quickest process.

### 3. buyWays Updates:

- a. PBS is working to generate a **monthly Workflow Approver Report**. The goal is to provide a report for business officers to share and review approver rules. This will resolve an issue of missing approvers by providing a check/ signoff.
- b. **Training - Penni Douglas, is available for on premises training during September** for general buyWays training. You can contact [supplier@clemson.edu](mailto:supplier@clemson.edu) to request training related to supplier registration (note we also offer training or help on registration to suppliers, so please direct them to the same email to request help). Users can take advantage of this training by sending a list of individuals and availability over to the [cubuyWays@clemson.edu](mailto:cubuyWays@clemson.edu). We are in the process of working on a procurement 101 type training course – if you have any recommendations or ideas on how best to present this, let us know.

- c. **Change Request** – while we rolled out a change request process to a limited number of folks over the Spring/Summer, we have identified enough small issues that need to be address with developers at Jaggaer, that we are not ready to roll it out to all users quite yet. Our current goal is to have tweaks in place and clear training put out by the end of 2019 so that this feature can be used by all users.
  - d. Several months ago we created a setting change in buyWays to allow users to have more visibility into supplier profile/status. We are asking business officers to confirm that everyone is aware of the “**TSM Viewer permissions,**” that gives them the ability to search for Active/ Inactive suppliers in buyWays. This permission has been given and training provided to **168 out of 459 users (Department AP and Requisitioners)**. If they or anyone in their department would like the permission in their profile or would like a quick 10-minute by phone training contact the buyWays team at [cubuyways@clemsn.edu](mailto:cubuyways@clemsn.edu).
4. **Relocation:** Procurement and Business Services is currently scheduled to relocate to Clemson Centre (2<sup>nd</sup> floor above Moes downtown) the week of 9/16. Still working out exact days with the project team, but expect us to be moving over the course of several days next week when we might not be immediately available or quickly able to respond to emails or calls.