

Policy & Procedures

Purchasing Department

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Policy and Procedures

- LC State 4.111 Purchasing Policy - posted on the [Policy website](#).
- Purchasing Procedure Manual posted on the [Purchasing site](#). The document contains detailed instructions on purchasing.
- Solicitation Checklist (including questionnaires) and Exemption Request forms posted on Purchasing Forms website:
<https://www.lcsc.edu/purchasing/employees/forms>



Purchase Orders & P-Card

- Purchase Orders and the Purchasing Card (P-Card) are the authorized means to acquire goods and services. This provides protection for the college as well as our vendors from individuals claiming to represent LC State who place orders fraudulently.
- College employees should not place an order or receive goods or services without being able to give the vendor a Purchase Order number or Purchasing Card number. This procedure gives our suppliers the assurance they have a bona fide order.



Purchase Orders

- A Purchase Order is created by entering a Requisition into the Jaggaer eProcurement system to route for approvals.
- Requisitions flow through an approval process of individuals and departments who are responsible for verifying accuracy, completeness, and availability of budget or funds to support the acquisition.
- The requester and approvers are responsible for determining and ensuring funds are available and properly budgeted for the acquisition.
- When the final approval is made on the requisition, the Purchase Order will be automatically generated and submitted to the vendor.



Dollar Thresholds

- Purchasing requirements by dollar threshold
 - **Under \$20,000 Purchase**
 - Solicitation not required, departments are encouraged to obtain quotes and use good judgement. Use state contracts or Jaggaer punchouts when applicable
 - Small (Informal) Purchases - **\$20,000 to \$249,999**
 - Purchasing Department will solicit quotes
 - Federally Funded Small (Informal) Purchases - **\$10,000 to \$249,999**
 - Purchasing Department will solicit quotes
 - Large (formal) Purchases - **\$250,000 or greater**
 - Purchasing Department will issue a Request for Proposal or Invitation to Bid
- [Procurement Method determination document](#)



State Contracts & Jaggaer Punchout

- Check State contracts & Jaggaer Punchouts first
 - Jaggaer Punchouts are cooperative contracts or state contracts
- Jaggaer Punchouts include Amazon, Grainger, Office Depot, Staples, etc.
- If you find a good or service elsewhere, that is equal or less than the contract price, there is a procedure to document and obtain approval.

State Contracts & Jaggaer Punchout cont.

- If the value of the single, one-time acquisition **is less than \$20,000**, the requester must include the comparison documentation (quotes, pdf of website, etc.) of the contract and non-contract price. Ensure the comparison documentation shows all applicable amounts, such as shipping and any other fees.
 - For P-Card purchases, documentation must be retained with the P-card transaction.
 - For PO purchases, documentation must be attached to the internal attachments on the requisition in Jaggaer.
- If the value of the purchase is \$20,000 or greater, complete the Exemption from Utilizing State Contract Request form, and submit with all comparison documentation to Purch@lcsc.edu
- **Excludes Information Technology and Office Furniture purchases.**



Exemption from Bid Requests

- Exemptions from solicitation process (competitive bid) may be approved.
 - Contact Purchasing to review the good or service you need for specific instructions. Exemption request form is required in some scenarios.
 - Examples: Educational discounts, professional/consultant/IT services
- Sole Source requests may be approved, if the requester can demonstrate only one vendor can provide the good or service.

Jaggaer Overview

Overview of Jaggaer

- Jaggaer is our eProcurement system, used for the full procure to pay cycle.
- Provides workflow, automation, reporting, and process efficiency.
- Shop directly with Punchout Catalogs with negotiated contract pricing.
- Approvers can approve via email and assign a substitute when they are out of office.



Overview Cont.

- Jaggaer supports shopper, requester and approver roles.
- Faculty and staff can be assigned the shopper role to shop, build a cart, and assign to a requester.
- Requesters have access to department/division cost centers and place orders into the approval workflow.
- Requests for access to cost centers are routed to the Controller's Office.



General Process

- All non-P-card purchases must be entered as a requisition in Jaggaer, prior to placing order/receiving the goods or services.
 - Use Payment Request for identified exceptions
- Requisitions are routed through the approval workflow, and PO's auto generated after last approval
- Enter receipts to confirm goods received/services rendered/invoice “OK to pay”
 - Receipts required for all PO's, except:
 - Check request, payment request and Team Travel Advance request



Types of Requests

- Purchase of goods or services from vendors
 - Punchout
 - Non-Catalog
 - Payment Request
 - Independent Contractor Payment (ICP) request
- Payment to non-vendors (staff, students, position candidates)
 - Check Request
 - Team Travel Advance Request
- Supplier Request
 - Request to invite Suppliers to PaymentWorks



PaymentWorks

- LC State has implemented PaymentWorks, a digital vendor management and payment security platform, to streamline vendor onboarding and facilitate electronic payments.
- PaymentWorks is vendor management platform that provides the following services:
 - Collection and update of vendor information
 - Validation/Verification of vendor information, including:
 - Banking information
 - Addresses
 - Tax Identification Numbers (EIN or SSN)
 - Vendor verification checks to ensure compliance with federal grant and Idaho statutes
- <https://www.lcsc.edu/purchasing/paymentworks>



General reminders

- Refer to Jaggaer resource page & Organizational Message (top of Jaggaer home page)
- Reminders from Accounts Payable:
 - AP processes checks on Wednesdays. Send AP any requests related to checks by end of day Monday.
 - <https://www.lcsc.edu/controllers-office/accounts-payable>





Thank you. Questions?

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