

School of Social Sciences

Business Office

Purchasing Workshop Fall 2023

The Soc Sci Purchasing Team

(socscipurchasing@uci.edu)

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School Wide Support

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Department Support:

Anthro | CLS



- All Business Office Purchase Requests should be sent to:
socscipurchasing@uci.edu
- In the subject line of the email include:
Department – PI/Requestor –Vendor
- Please communicate to your faculty to not send requests to our personal email addresses.
- Submit **one** PR form per vendor and **one** order per email.
- Include all quotations or other descriptive information with the Purchase Request form.

APPROVALS

- Managers must approve all department purchases, **prior** to the cardholder making the purchase.
- Faculty must approve all orders on their accounts, **prior** to the PR form sent to Soc Sci Purchasing.
- Fiscal Officer must approve PR on managing accounts, **prior** to purchase.
- Any purchase requests over \$2,500 and/or purchases for furniture or unusual items, should be sent to the Director of Finance for approval, **prior** to purchase.
- Furniture requests need the approval of the Director of Facilities Management and Space Planning, **prior** to the purchase.
- **An approved Purchase Order by Procurement, must be in place PRIOR to committing University funds or services being rendered.**

DEPARTMENT PURCHASE PROCESS

Step One

- Faculty or department staff fills out PR form
- Staff obtains back-up and attaches it to PR form
- Staff determines PR is a Department purchase
- PR form is sent to Manager for approval



Step Two

- Manager Reviews for Completeness, accuracy, policy, and fund availability.
- Returns PR form to staff for processing



Step Three

- If over \$2,500, pre-approval by the Director of Finance is required
- Staff then makes the purchase
- Once transaction hits Action List in KFS, staff uploads back-up documentation, within 5 days

BUSINESS OFFICE PURCHASE PROCESS

Step One

- Faculty or department staff fills out PR form
- Staff obtains back-up and attaches it to PR form
- Staff determines PR is a Business Office purchase
- Staff ONBOARD'S VENDOR
- PR form is sent to Manager for approval



Step Two

- Manager Reviews for Completeness, accuracy, and policy.
- Returns PR form to staff for processing



Step Three

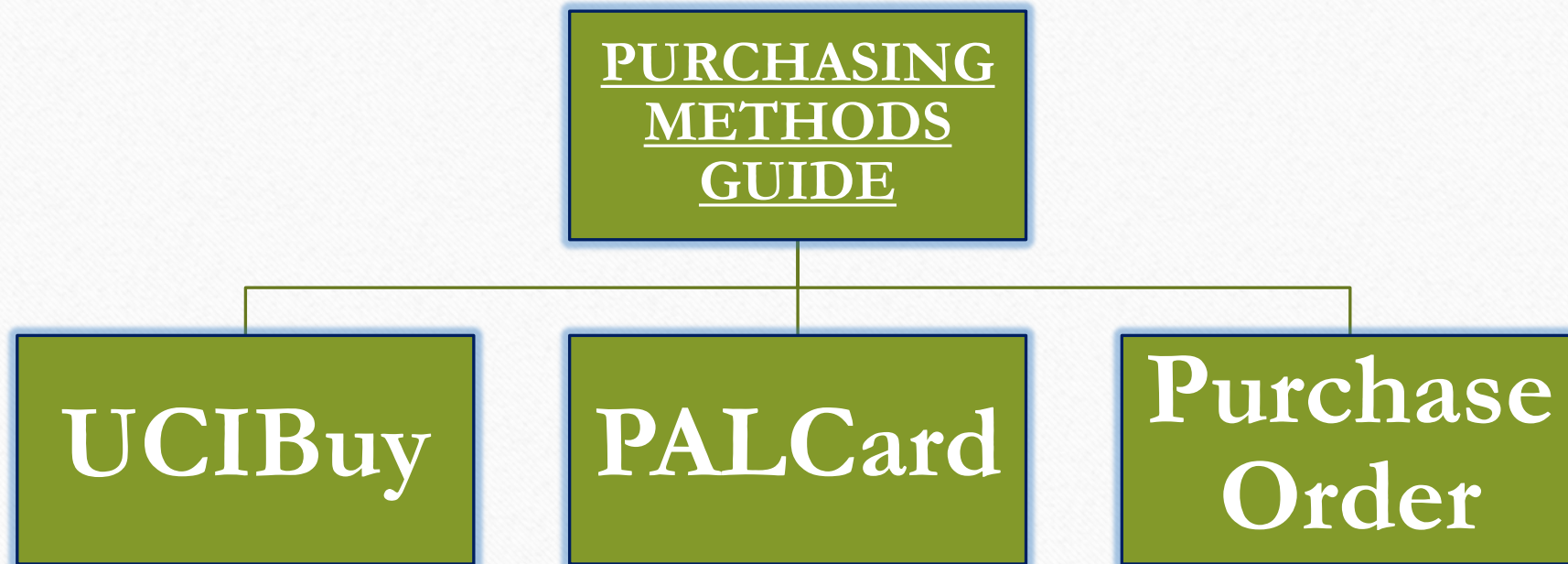
- Staff makes sure vendor is onboarded
- Staff sends PR form, along with any back-up, to Soc Sci Purchasing email address and cc's Department Manager and PI



Step Four

- Business Office staff reviews and verifies policy, funding availability and allowability
- Obtains any additional approvals if needed
- Staff then processes PR

PURCHASING METHODS



	A	B	C	D	E	F
1						
2	Commodity (Description of Goods or Services)	Buying Tool(s)	Authorized Buyer	Additional Approving Department	Policy Reference and Information	
3	DO NOT process Disbursement Vouchers (DVs) for the commodities listed below unless otherwise stated.					
4	*UC Fair Wage/Fair Work (FW/FW) and SB 854 Prevailing Wage (PW) impact services, making it a high value request. Please plan accordingly when acquiring services.					
86	Fume hood certification - only UCOP contracted vendor o Technical Safety Services	PALCard	Department			
87	Fume hood certification - all other companies not listed above	KFS Requisition	Department		Check to see if Fair Wage/Fair Work	or Prevailing Wage apply.
88	Furniture purchases (Tangram Interiors stand-alone items for campus delivery only)	UCIBuy	Department		Tangram Interiors Punchout Catalog (under Furniture) in UCIBuy	
89	Furniture purchase (New) – any type including chairs, couches, desks, tables, cabinets, etc.	KFS Requisition	Procurement Services			
90	Furniture purchase (Pre-Owned) – any type including chairs, couches, desks, tables, cabinets, etc.	KFS Requisition	Procurement Services		How to purchase pre-owned furniture.	
91	Furniture rental – non-fabric chairs, tables and umbrellas	PALCard KFS Requisition	Department		Facilities Management is required to set up for events located on campus. Article 5 of the University Collective Bargaining Agreement and Regents Policy 5402: Regents Policy Generally Prohibiting Contracting for Services.	
92	Furniture rental – fabric or upholstered chairs, etc.	KFS Requisition	Procurement Services		Facilities Management is required to set up for events located on campus. Article 5 of the University Collective Bargaining Agreement and Regents Policy 5402: Regents Policy Generally Prohibiting Contracting for Services.	
93	Gifts or gift-related items for employees, non-employees or students for any occasion, including retirement, bereavement or employee recognition. Items include, but are not limited to: flowers/plants, gift cards, plaques, UCI- logo attire, gift wrap and paper/packaging supplies etc.	Corporate Card (event and non-event) o Reimbursement through ENT Or personal funds o Reimbursement through DV			G-41,G-42	
94	Hazardous chemicals and materials (as identified by UNSPSC)	KFS Requisition	Procurement Services	EH&S	707-10, Section L	
	Hotel and lodging	CTS Account, Corporate Card or Personal Funds			UC Travel Regulations	UCI Travel and Transportation

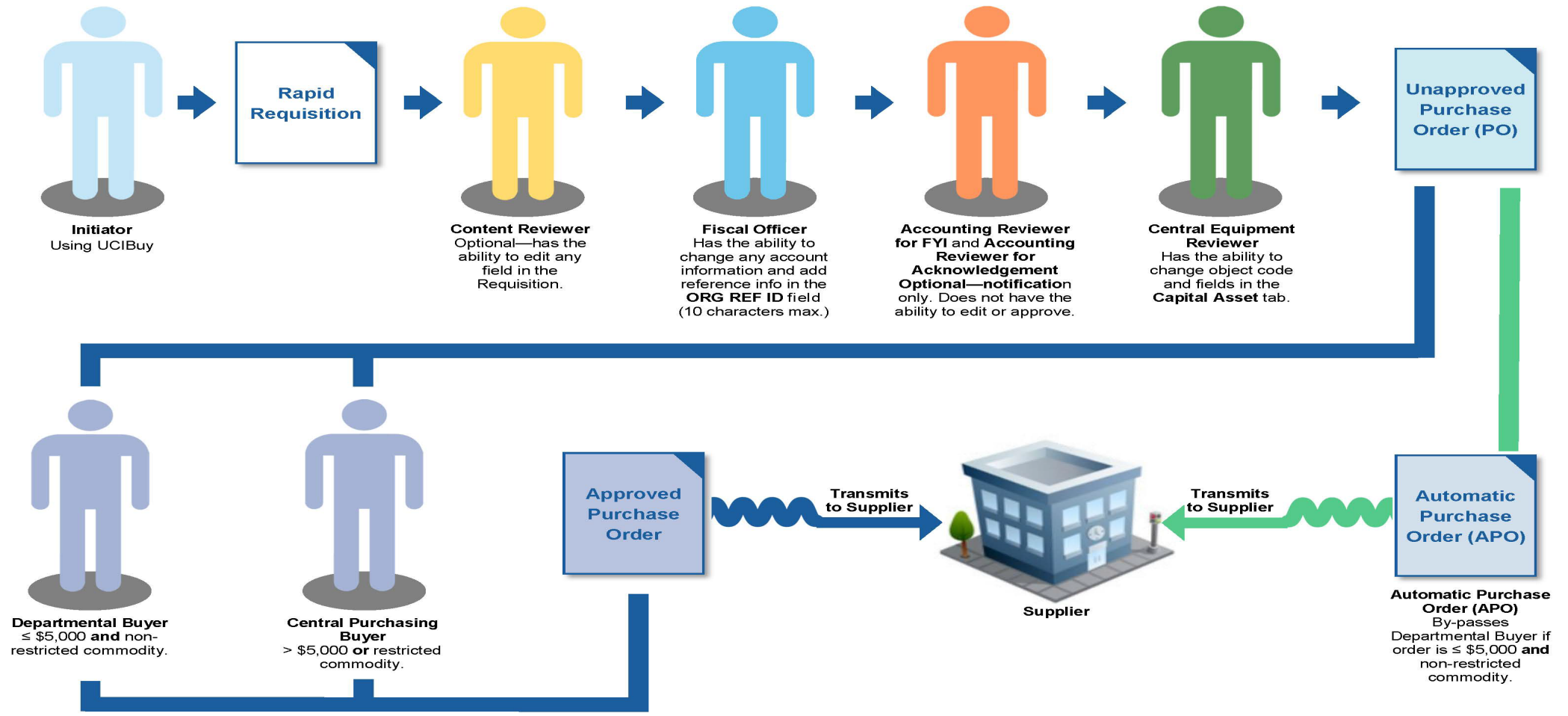
UCIBuy

- UCIBuy offers a wide array of laboratory supplies, life science solutions, medical equipment, office supplies, computers and peripherals, as well as facilities maintenance, repair, and janitorial products.
- Shopping using UCIBuy streamlines the KFS requisition process by auto-populating many fields and tabs and accelerates the approval workflow process.
- **More information and training:**
<https://procurement.uci.edu/ucibuy/index.php>



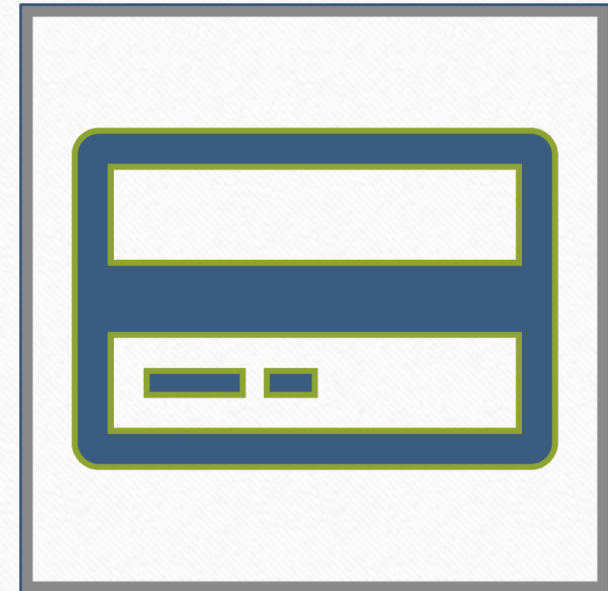
UCI Procurement Services

UCIBuy and Automatic Purchase Order (APO) Workflow

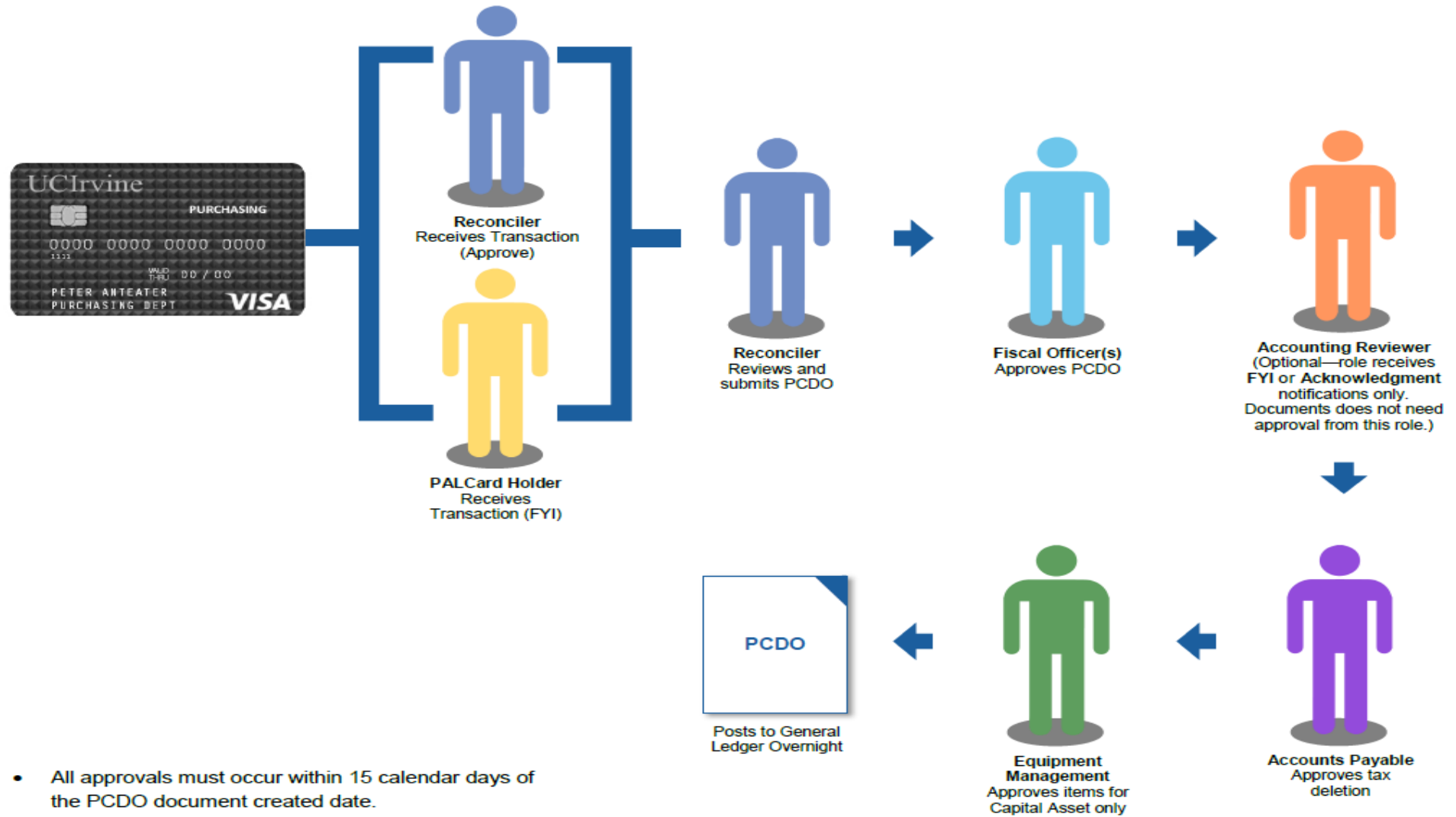


PALCard/PCDO

- **Low Value Purchases**
- **Unrestricted purchases \$5,000 or less, including tax and shipping**
- **Purchases requiring a signature, (contract or agreement), are NOT permitted on PALCard.**
- **Always include the KFS Doc# on the PR, as well as (if applicable) the Project Code and Org Reference ID before uploading to KFS.**
- **Upload backup documentation to KFS, once you receive an FYI, within 4-6 calendar days or less.**
- **More information and training:**
<https://procurement.uci.edu/palcard/index.php>
- **PALCard Holders Mailing List Subscription:**
<https://maillists.uci.edu/mailman/listinfo/palcard-holders>

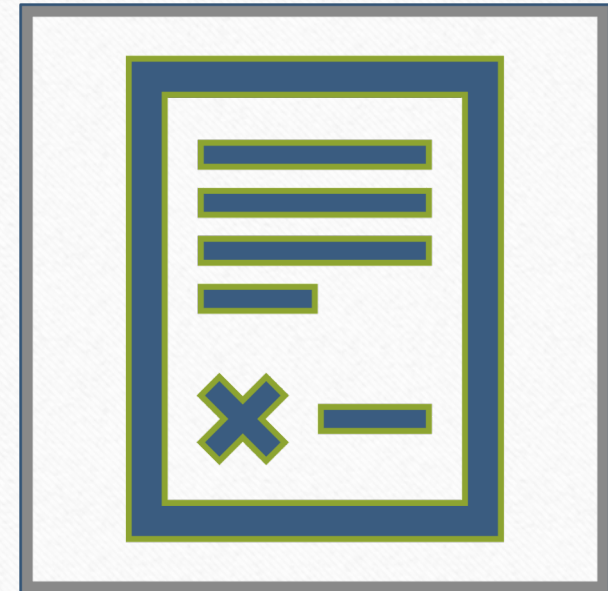


PALCard Document (PCDO) Reconciliation

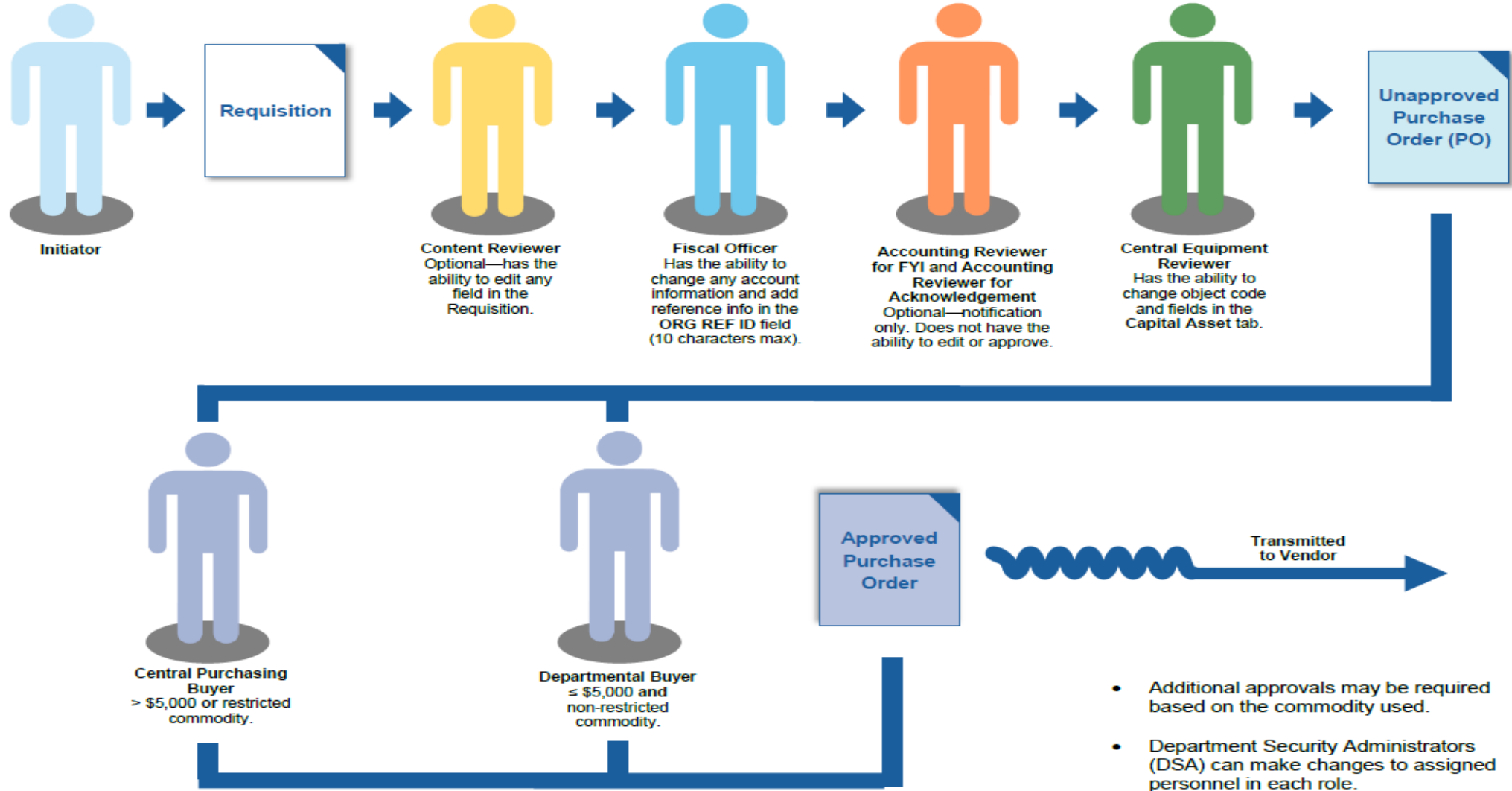


Purchase Order

- High Value Purchases
- Purchases greater than or equal to \$5,000 or containing any restricted item(s).
- All services are processed through a Purchase Order.
- A detailed Purchasing Agreement Information Form should be included with the PR for all purchases being processed through a PO.
- An approved Purchase Order by Procurement, must be in place PRIOR to committing University funds or services being rendered. If a PR form is submitted to the Business Office, after-the-fact, please provide a justification.



PURCHASE ORDER WORKFLOW



DO NOT FILL THIS OUT FOR THE PRINCIPAL INVESTIGATOR

RESET

PURCHASING AGREEMENT INFORMATION

Supplier's name, authorized Supplier Signatory's full name, address, phone number and email address:

PI Name, department and contact information:

Scope of Work: a FULL DESCRIPTION of the SERVICES, including any tasks/deliverables/reports/dates/milestones:

Describe how (and by whom) the vendor was selected (include any extenuating circumstances):

Duration of the services (What are the BEGINNING and END DATES?) Please confirm if services have already started, not yet started, or have been completed:

Location of services (address):

1

Payment amount by the hour, day, month, or job and Total Not to Exceed amount:

Sources of any federal funding, include Grant/Cooperative Agreement Number:

Will the services involve access to restricted/sensitive data?

YES NO

• PHI (protected health information)

• PII (personally identifiable information)

• Student records

• University networks/data systems

Also consider the following:

YES NO

• Is this individual currently employed by UC?

• Was this individual a University employee at any time during the past 12 months?

• Was the selection of this individual made or influenced by a near-relative who is a UC employee?

• Will the services be conducted on campus?

• Will the vendor be in California while performing the services?

2

DO NOT FILL THIS OUT FOR THE PRINCIPAL INVESTIGATOR

RESET

PURCHASING AGREEMENT INFORMATION

Supplier's name, authorized Supplier Signatory's full name, address, phone number and email address
Pacific Island Ethnic Art Museum (PIEAM) email: flujan@pieam.org 695 Alamitos Ave., Long Beach, CA 90802 562-216-4170
PI Name, department and contact information
Tiara R. Naputi Dept of Global & International Studies tnaputi@uci.edu cell phone: 949-300-8252
Scope of Work: a description of the services, including any tasks/deliverables/reports/dates/milestones
Hiring Pacific Island Ethnic Art Museum (PIEAM) to be a team collaborator with Principle Investigator (Naputi), sharing responsibility to map stories of Native Hawaiian Pacific Islander (NHPI) and Indigenous communities in Orange/Los Angeles counties. Utilizing the talent of the PIEAM to also focus on indigenous methodologies and arts interventions for educating the public, and sharing community-based practices about Indigenous and Pacific communities. Tasks/Deliverables: organizing logistics for event(s) pertaining to utilization of the PIEAM as a site for gathering stories and addressing topics related to Indigenous experiences, sovereignty, & relationships with local Indigenous and Native Hawaiian, and Pacific Islander (NHPI) communities in Orange/L.A. County. PIEAM will engage with Indigenous groups and communities in California, with Principle Investigator (Naputi) and her team and will help provide the museum as a place to host materials and a public exhibit that showcases the story mapping and identified topics for the project. Dates: By April 30, 2024 content will be provided to Principle Investigator (Naputi) for report; materials for exhibit to be launched by AY 2024-2025 (specific timeline to be determined by PIEAM/supplier in alignment with principle investigator, services and tasks)
Describe how (and by whom) the vendor was selected (include any compelling circumstances)
<small>The PIEAM was selected because it is the only Pacific Island Museum in the continental United States. The PIEAM also has a priority to ensure that learning knowledge is in alignment with the multiplicities of the Pacific Islands people that it serves, the place recognizes the value of arts, cultural practices, and languages are intrinsically intertwined to the ongoing participation of people. The Museum Director & Curator of PIEAM, Fran Lujan, also has expertise working with cultural practitioners, PI, and Indigenous artists, prioritizing a decolonized narrative. She is a member of the National Asian Pacific American History & Culture Task Force. She was awarded the 2022, Ernest M. Pon Award from the Association of Ethnic Studies, which recognizes AA and PI organizations and individuals dedicated to human rights and equal justice. She also has connections with organizations and groups that provide further insight for the project of mapping stories in California.</small>
Duration of the services (What are the beginning and end dates?) Please confirm if services have commenced and/or completed.
Beginning September 18, 2023 [planning/implementations phases for fall event(s)]. Conclude with content for Naputi's report deliverables by April 30, 2024; conclude with PIEAM exhibit by end of AY2024-2025.
Location of services (address)
PIEAM - 695 Alamitos Ave., Long Beach, CA 90802; UCI campus; Orange County/Los Angeles County, California, USA

1

Payment amount by the hour, day, month, or job and Total Not to Exceed amount.		
Payment amount calculated for overall job; coordinating logistics for community events at PIEAM; utilizing expertise and space for gathering stories; creating and organizing materials for exhibition in AY23-25: \$6,000		
Sources of any federal funding		
N/A		
Will the service involve access to restricted/sensitive data?	YES	NO
• PHI (protected health information)	<input type="radio"/>	<input checked="" type="radio"/>
• PII (personally identifiable information)	<input type="radio"/>	<input checked="" type="radio"/>
• Student records	<input type="radio"/>	<input checked="" type="radio"/>
• University networks/data systems	<input type="radio"/>	<input checked="" type="radio"/>
Also consider the following:	YES	NO
• Is this individual currently employed by UC?	<input type="radio"/>	<input checked="" type="radio"/>
• Was this individual a University employee at any time during the past 12 months?	<input type="radio"/>	<input checked="" type="radio"/>
• Was the selection of this individual made or influenced by a near-relative who is a UC employee?	<input type="radio"/>	<input checked="" type="radio"/>
• Will the services be conducted on campus?	<input checked="" type="radio"/>	<input type="radio"/>
• Will the vendor be in California while performing the services?	<input checked="" type="radio"/>	<input type="radio"/>

2

- **Contract Services in the Procurement Office are responsible for signing all contracts or agreements requested by vendors.** They will analyze and review terms and conditions to assure compliance with state and federal laws, and UC or campus policies. **No one is to sign any contracts or agreements** on behalf of the University, except Contract Services.
-

Name _____

Signature _____



“AFTER – THE – FACT “ PURCHASE ORDER

From the information provided, the services were already completed prior to Procurement’s approval of the POs. According to UCOP’s Procurement policy (excerpts below), a purchase made without an approved agreement or a Purchase Order is unauthorized (except for an approved purchase on a PALCard) and can result in negative consequences for the campus and the person making the purchase. In the future, please take appropriate measures to avoid these situations and obtain Procurement’s formal approval prior to making the purchase.

- **BUS-43, Section III, Part 1, H. Unauthorized Purchases:**

- **1. Responsibility:** An individual who has not been delegated purchasing authority who makes an unauthorized purchase of goods or services shall be responsible for payment of the charges incurred. At the discretion of the Location’s Policy Exception Authority:
 - **a.** The unauthorized individual may be required to pay either the full amount whenever the purchase is found to cover unneeded items or items whose purchase would not otherwise be authorized and the transaction cannot be canceled, or the amount of any cancellation charges incurred when cancellation can be arranged; or
 - **b.** The unauthorized individual may be required to pay the difference between the charges such individual incurred and those the University may reasonably have incurred if the purchase had been properly executed.
 - **c.** The unauthorized individual may be required to reimburse the University for unauthorized purchase of good or services.
 - **d.** Reimbursement or payment of unauthorized purchases require policy exception by a location’s policy exception authority and/or designee(s).

COVERED SERVICES

Will the Supplier provide “covered services” as defined by [Regents Policy 5402](#)?

If yes, you must obtain an approved [Covered Services Request Form \(DocuSign\)](#) from Employee Workforce Relations prior to submitting your Purchase Request. Include the approved form and Wage Benefit Parity Appendix from EWR with your Purchase Request.

Should you have any questions, please contact [Enterprise Workforce Relations \(EWR\)](#) directly.

- Cleaning, custodial, janitorial or housekeeping services
- Food services
- Laundry services
- Grounds keeping
- Building maintenance
- Transportation and parking services
- Security services
- Billing and coding services
- Sterile processing
- Hospital or nursing assistant services
- Medical imaging or other medical technician services.
- Chairs and Table Set-up

SOURCE SELECTION & PRICE REASONABLENESS JUSTIFICATION FORM (SSPR)

- This form is required for all **federally funded** purchases **≥\$10,000** (including tax and shipping) & **non-federally funded** purchases **≥\$100,000** (excluding tax, but including shipping), to substantiate the appropriateness of source selection and price reasonableness.
- The **responsible requesting party** in the department should complete this form with detailed facts and explanation.
- Include **SSPR** with **ALL** federally funded purchases over **\$10,000**, with the Purchase Request Form.
- **SSPR Form**
- **Instructions for completing the form:**
https://procurement.uci.edu/_files/documents/strategic-initiatives/dept-buyer-training-meeting-7-25-23.pdf

This form is required for all federally funded purchases **≥\$10,000** (including tax and shipping) & non-federally funded purchases **≥\$100,000** (excluding tax, but including shipping), to substantiate the appropriateness of source selection and price reasonableness.

When completing this form, you must provide **detailed facts and explanation**. **Do not merely restate the question as a conclusion**. Please reference the **SSPR Instructions and FAQs** for assistance understanding each section of this form.

Requisition #: _____ Dollar Amount: _____
Desired Supplier: _____ Campus Department: _____

I. SOURCE SELECTION: (This Section is Required in all cases) Check the applicable box from one of the funding sections below. For mixed funding where the federal portion exceeds \$10,000, check Federal side only.

Federal Funds:

- Formal Competitive Bid/Contract# _____
 Certified Small Business \$10K to \$250K (Complete III, VII, VIII)*
 Competitive Proposals < \$100K (Complete II, VII, VIII)
 Sole Source (Complete III, IV, VII, VIII)

Non-Federal Funds:

- Formal Competitive Bid/Contract # _____
 Certified Small Business or DVBE \$100K to \$250k (Complete III, VII, VIII)*
 Sole Source (Complete III, IV, VII, VIII)
 Professional Services; Personal Services (Complete III, V, VII, VIII)
 Unusual & Compelling Urgency/Emergency (Complete VI, VII, VIII)

*For Certified Small Business option, you must obtain a quote from two or more certified small businesses. Upload the quote and small business certification for each company to the requisition.

II. COMPETITIVE PROPOSALS: (Complete if Federal Funds Competitive Proposals is checked in Section I.) Obtain price or rate quotations from three (3) qualified sources (including your selected supplier). This section is required by 2 CFR § 200.320(a)(2)(i).

Please obtain a **total of 3 informal, competitive quotes**. Attach copies of quotes, and complete the following:

Supplier A: _____ Price: _____
Supplier B: _____ Price: _____
Supplier C: _____ Price: _____

If selecting a supplier *other than the lowest-priced supplier*, explain your justification for selecting a more expensive supplier in the box below. (If you are selecting the lowest-priced supplier, skip Sections III-VI.)

III. PRICE REASONABLENESS: (Complete if Sole Source, Certified Small Business/DVBE, Professional Services or Personal Services is checked in Section I.) This section is required by the CA Public Contract Code 10508 and FAR provision Subpart 15.4.

- 1) In the box below provide detailed facts (not conclusions) how you determined the price/fees are fair and reasonable.
- 2) For Federal grant and cooperative agreement orders **≥ \$250,000** include profit negotiations you had with the supplier if such purchase has no price competition (see CFR § 200.324(b)).
- 3) For sole-sourced Federal non-commercial contract orders **≥ \$2M**, FAR subsection 15.403-4 requires Suppliers to submit certified cost or pricing data (TINA). Use the 'UC Certified Cost or Pricing Data for Federal Contract Purchases' form (located on UCOP website) and include with this Form.

Supplier Security Review Questionnaire

securityreviews@uci.edu

To initiate the Supplier Security Review Process:

- Download and complete the [Supplier Security Review Questionnaire](#)
- Email form to securityreviews@uci.edu to request a supplier security review, where it will then be triaged by OIT Security within [ServiceNow](#).
- If purchased on PALCard, be sure to include the **OIT Approval** with backup.
- If going on a Purchase Order, include the **OIT Approval** with the Purchase Request Form.

UCI Office of Information Technology

Supplier Security Review Questionnaire

Name of Software or Service being purchased:

Link to Supplier Website:

Briefly describe the main use(s) of this Supplier and the types of data involved:

Type of Purchase (Please select all that apply)

Hardware
 Software
 Cloud Service
 Licenses
 Service Contract
 Contractor
 Other

Will this software be installed locally at UCI, hosted in the cloud, or a combination of both?

Locally
 In the Cloud
 Both

Is this a new purchase, a renewal, or expanded use of an existing agreement?

New
 Renewal
 Expanded use

What is the Protection Level of the data or systems? (P1-P4) P1

SECURITY	Yes	Unsure	No	Please explain
Will the Supplier have any access to UC systems, data, or collect data on our behalf?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Could this Supplier potentially cause harm to life or property?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Will Supplier be involved in processing credit card payments?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Will this Supplier be used to collect, store, process, access, or transmit data related to any of the following:				
• Sensitive research data with external security requirements including health/medical data, DOD, DOJ, personal or genetic info, human subjects protocols, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Student records (FERPA, financial aid, grades, contact information)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Sensitive UC business information (HR, accounting, payroll, employee, or other sensitive internal info)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Personally Identifiable Information (PII) Basic: Name with address, phone, e-mail, date of birth, or other non-sensitive personal information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• PII Sensitive: Name with SSN, drivers license, passport, credit card, medical, biometrics, or etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Medical information: HIPAA, disability, genetic, vaccination info, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Information regarding European residents or UK residents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Other information classified as P3 or P4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
• Low risk P1 or P2 information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Name of Requester

Department/Unit

Email Address

Date

Send completed form to securityreviews@uci.edu For help, visit <https://security.uci.edu/services/supplier-review/>

Electronic Communications Equipment Form

- Computers and other electronic equipment purchased with University funds remain the property of the School of Social Sciences.
- Include a signed employee agreement with the Purchase Request Form.
- Electronic Communications Equipment Form

Appendix A

To: DEPARTMENT HEAD

Re: Employee Agreement Concerning the Use of Electronic Communications Resources

I hereby certify that I am the recipient of the following University-provided electronic communications equipment and/or services (check appropriate box):

Equipment - I agree that this equipment is to be used primarily for official University business, and that any personal use of the equipment will be incidental in nature. I agree to reimburse my department for any personal use of this equipment that results in noticeable incremental costs to the University and will exercise appropriate care and caution when using the equipment, in accordance with the policy and procedures set forth in Business and Finance Bulletin G-46, Guidelines for the Purchase and Use of Cellular Phones and Other Portable Electronic Resources (attached). In addition, I understand that all records related to the purchase, use, and disposition of this University-owned equipment, including cell phone statements, are the property of the University and potentially subject to disclosure under the California Public Records Act.

I further understand that I am responsible for safeguarding the equipment, including any data on the equipment, and controlling its use in accordance with BFB G-46. If the University determines that there is no longer a business need for me to possess such equipment, I will return the equipment. Likewise, if I separate from University employment, I will promptly return the equipment to my department.

Services - I agree that this service is to be used primarily for official University business, and that any personal use of the service will be incidental in nature. I agree to reimburse my department for any personal use of this service that results in noticeable incremental costs to the University, in accordance with the policy and procedures set forth in Business and Finance Bulletin G-46. In addition, I understand that all records related to the purchase and use of this University-provided service, are the property of the University and potentially subject to disclosure under the California Public Records Act.

I further understand that if the University determines there is no longer a significant business need for me to utilize this service, the University will discontinue its funding of the service. Likewise, if I separate from University employment, the service will no longer be paid for or reimbursed by the University.

Name: _____ Title: _____

Signature: _____ Date: _____

LINKS TO FORMS

Soc Sci PR Form:

<https://www.business.socsci.uci.edu/files/docs/2018/SocSci%20PO%20Form%20Official.pdf>

Purchasing Agreement Information:

<https://acrobat.adobe.com/link/review?uri=urn:aaid:scds:US:3c798721-bcc8-328a-893f-8d78c009a2ce>

Supplier Security Review Questionnaire:

<https://www.security.uci.edu/services/supplier-review/questionnaire/>

Conflict of Interest Form and Guide Video:

<https://procurement.uci.edu/files/documents/contracts/forms/conflict-of-interest-form-web.pdf>

<https://www.youtube.com/watch?v=Do35d3qj2qs>

Electronic-Communication-Equipment:

<https://procurement.uci.edu/files/documents/equipment-management/forms/electronic-communications-equipment-form.pdf>

Purchasing Methods Guide:

<https://docs.google.com/spreadsheets/d/1qVxQCEEctFowH9hImw59RaRI8FRFij1EPhGjsNP9UkE/edit#gid=0>

Source Selection & Price Reasonableness Justification form (SSPR)

<https://procurement.uci.edu/files/documents/procurement/forms/uci-source-selection-price-reasonableness-form.pdf>

Covered Serves Request Form:

<https://na3.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=9e69d47f-43fa-470d-8353-0c9b3d2d5ac5&env=na3&acct=618fe38f-33cd-47c1-b564-9c2a5711bcff&v=2>

Links to Policies and Websites:

BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management:

<https://policy.ucop.edu/doc/3220485/BFB-BUS-43>

Article 5 of the Collective Bargaining Unit:

https://ucnet.universityofcalifornia.edu/labor/bargaining-units/sx/docs/sx_article_05_contracting_out.pdf

Regents Policy 5402: Policy Generally Prohibiting Contracting for Services:

<https://regents.universityofcalifornia.edu/governance/policies/5402.html>

Equipment Management:

<https://procurement.uci.edu/equipment-management/index.php>

Purchasing Methods Guide:

<https://docs.google.com/spreadsheets/d/1qVxQCEECtFowH9hImw59RaRI8FRFij1EPhGjsNP9UkE/edit#gid=0>

PALCard:

<https://procurement.uci.edu/palcard/index.php>

Supplier Security Review:

<https://procurement.uci.edu/procurement/buying-software-it-services.php>

<https://www.security.uci.edu/services/supplier-review/>

UCIBuy:

<https://procurement.uci.edu/ucibuy/index.php>

Small Business First FAQs (PDF):

<https://www.ucop.edu/procurement-services/for-ucstaff/small-business-first/small-business-first-faq.pdf>

UCI Procurement FAQs:

<https://procurement.uci.edu/faqs/#Procurement>

TAKE AWAYS

- Send Purchase Request Forms to socscipurchasing@uci.edu and not to BO staff.
- **FULL DETAILED JUSTIFICATION** and **BUSINESS PURPOSE** is required for all purchases.
- All purchases need **PRIOR** approval before making the purchase.
- Faculty are to fill out all forms.
- **Procurement** must approve Purchase Order **PRIOR** to services being rendered.
- **No one is to sign any contracts or agreements on behalf of the University, except Contract Services.**
- Check to see if vendor is onboarded, and if not, send invite through PaymentWorks.
- **Supplier Security Review Questionnaire Form** , must be filled out by the PI or the person requesting the software or platform and sent to securityreviews@uci.edu for approval.
- **Purchasing Agreement Information Form** should be filled out by the PI for all services and needs to be very detailed and complete.
- Consult the [Purchasing Methods Guide](#) for allowable services via PALCard, prior to making the purchase.

Q & A
