What is purchasing?

The activity of acquiring goods or services to accomplish the goals of Claflin University.

Who can do the purchasing? All persons who have been delegated the authority to commit University funds through the purchasing function must adhere to the processes contained in this manual. In addition, the university expects that any individual making purchases on behalf of the University will follow the principles referenced in the manual

Who is a purchasing/procurement agent?
The University has adopted a centralized purchasing system which requires that the acquisition of all goods and services be channeled through the Purchasing Department.

Procurement Agent: An individual who is part of a procurement organization at Claflin and has been

given transaction authority by the head of procurement function to negotiate, authorize and execute

purchases on behalf of Claflin University.

2. Who are the purchasing personnel at Claflin University?

Mrs. April Spraggins-Johnson	Mr. Pavel A. Thakur
Junior Procurement Specialist	Senior Procurement Specialist
Auxiliary Services	Auxiliary Services
Russell Street Campus , MO	Russell Street Campus , MO
aspriggins-johnson@claflin.edu	apavel@claflin.edu
Ph: (803) 535-5215	Ph: (803) 535-5486
Fx: (803) 535-5391	Fx: (803) 535-539

3. Who can make purchases? And who may not?

All persons who have been delegated the authority to commit University funds through the purchasing function.

No individual has the authority to enter into a purchase contract(s) or in any way obligate Claflin University for procurement indebtedness unless specifically authorized by the President, Vice President of Fiscal Affairs or the Director of Purchasing.

4. What is the purchasing process?

Any request(s) for goods and/or services must be made via e-requisition to the Purchasing Department.

The e-requisition must include Requestor's name, Vendor's name, Account Number from which funds

should be taken (The account used must be sufficient for the items being requested), Approval track ID,

Date order is needed, if necessary, Quantity of items and/or services being requested, Cost of items,

and/or services, List the items you wish to purchase providing sufficient information for correct

identification (i.e., a manufacturer's name, model or catalog number, size, color, etc) Note: Tax should
be added to applicable purchases.

5. What is e-requisition?

Please see the link:

6. What is the Claflin University policy for purchasing?

Please see the link:

7. Who is a requestor?

The employee who enters a request through e-requisition to procure goods and/or services on behalf of

the University.
8. Who is a vendor?

An individual or organization that provides specified and agreed upon goods and/or services to the

University
9. What is needed before entering an e-requisition?

The e-requisition must include Requestor's name, Vendor's name, Account Number from which funds

should be taken (The account used must be sufficient for the items being requested), Approval track ID,

Date order (is needed, if necessary), Quantity of items and/or services being requested, Cost of items,

and/or services, List the items you wish to purchase and provide sufficient information for correctly

identifying the item to be purchased (i.e., a manufacturer's name, model or catalog number, size, color,
etc)

10. What service(s) does Purchasing Department provide?

- Creating Vendor ID (VID#) and enter it in to Jenzabar
- After assessing the e-req in the approving portal:
    - Create Purchase order and inform the respective parties concerned
    - If there is any dispute or errors, inform the respective partie(s).
- Review the negative encumbrances and follow up with IT.
- Advise the vendors name and information to the requestors, if needed.
- Reply/ respond to all quires/ emails on the same day
- Follow up with the delivery and or services being rendered.
- Follow up with the payment, if requested.

11. Who are the customers to Purchasing Department?

- Students
- Requestors (Faculty, staffs, employees of CU)
- Vendors
- Accounts Payable Department
- All employees of CU including all departments

12. What is required for new vendors?

- W-9 form filled and signed (see the link for the form)
- Vendor request form duly filled in(see the link for the form)

The vendor selection process at Claflin University must identify the best, most qualified and/or

suitable vendor to meet the needs of the university, while complying with all applicable laws

and regulations.

13. What is approval track? Why it is important?

All the requisitions need to go through a panel of approving authority. Each person needs to approve the requisition before issuing a purchase order. It differs per departments, items etc.

It is important because the panel is being authorized to approve e-requisitions for a certain dollar amount.

If the Track is NOT assigned, the PO will be treated as unauthorized, and it will be voided.

14. How the Purchase Order gets approved? How long it is required for final approval?

PO's get approved according to the approval track and dollar amount of requisition. Typically per the

purchasing policy of Claflin University:

- Small purchases from $100.00- $5000.00 may be accomplished 3-5 business
- Purchases from $5,000.01 to $10,000.00 require a minimum of 5-7 business days and written quotes from three (3) qualified vendors.
- Purchases from $10,000.01 to $35,000.00 require a minimum of 7-10 business days and three written quotes from three (3) qualified vendors.
- Purchases exceeding $35,000.00 will require a formal sealed 45 - 60 days bid by the Purchasing Office. (Exception to this requirement may be granted by the VP of Fiscal Affairs.)

15. What are Open/ Blanket PO's?

It allows use of a single order number for an entire period (usually 6-months or 12-months) and enables

selected users to deal directly with a supplier. This type of agreement is usually made between the vendor and the authorized procurement agent to cover products whose needs are immediate and whose use is sporadic and unpredictable.

16. What laws apply for University purchases?

Federal Regulations for Restricted Grants (See Appendix A: 2 CFR from CU Procurement Policy Procedure Manual) 215.47 (Contract Administration); 2 CFR 215.48 (Contract Provisions) Federal Regulations for Restricted Grants - Suspension and Debarment Program. Suspension and Debarment actions prevent companies and individuals from participating in government contracts, subcontracts, loans, grants and other assistance programs. The effect of suspension and debarment by a Federal agency is government wide. 2 CFR Part 180 and 2 CFR Part 1532. Claflin University Procurement Office/Business Office will review the online suspension & debarment list annually.

17. How are orders processed?

- Be sure there are adequate funds before submitting your request
- Complete the E-requisition in the Purchasing Module of Jenzabar
- Attach supporting documents for your request
- Submit it for approval
- When the PO has been created, you will be notified along with the vendor.
- Our POs are valid for up to 45 days (generally) Items are delivered according to the terms and the conditions of the quote/ invoice/contract etc. So, all merchandise is delivered within that time. Please let us know if items are not delivered by that time frame. Please inform purchasing if items are not delivered in a timely matter.

18. Who are consultants/ Independent Contractor/ freelancer?

An independent contractor, commonly referred to as a consultant, freelancer, contractor, etc. is an individual or entity engaged to perform services.

19. How does the University work with consultants?

Individuals must use the university-approved "Request Form for Consultative Services" when requesting the services of independent contractors or consultants. Before services commence, the contract must be approved and signed by the appropriate Vice President, Vice President of Fiscal Affairs and President. (Additional signatures may be required when spending Federal Funds.)

20. What if I need computer, computer equipment, software etc. (any Technology Purchase)?

The Information Technology Department must approve technology purchases to include, but not

limited to, computers, printers, software, and telephones. The requestors must enter put the request through

the IT approval track. Our primary technology vendor is Dell Marketing Ltd. Apple is also our vendor.

21. How do I get furniture?

The requestor should follow the same procedure to buy furniture. The quote must include the

installation charges, since the university does not have any person to fix/ install/ set up the furniture. Our office supply vendor Forms and Supply also sells furniture.

(Please see their website: www.fsioffice.com.). User name: CLAFLIN; Password: Pricing/OR contact

with Mr. Dan Peagler email: dan.peagler@formsandsupply.com

It is not mandatory to purchase furniture from Forms and Supply.

22. How I can order for printing?

Submit a requisition with a copy of the material to be printed to the Print Shop 10 days before the

job is required. If the materials cannot be produced in the Print Shop, the Print Shop manager will

provide documentation for outsourcing the job.

23. Do I have to create an E-requisition for using a CU Motor Vehicles? If yes, how?

Yes. To get the vehicle on time you must follow the same procedure and obtain a purchase order

before the car may be picked up.

24. What if I do not get my items in time?

Call or E-mail purchasing. Provide the PO number including the item/service in question

25. What if I receive the wrong items?

- Call or email purchasing with the related PO number.
- Call Shawn Sheard in Receiving and inquire about returning goods. Keep all records for future references.
- Make you are aware of the vendors return policy; these policies vary
- You must follow up with the refund/credit for the returned items.

26. What is credit hold?

An account will be put on credit hold if an invoice (s) wasn't paid during its grace period according to

payment terms and conditions.

If an account is put on a credit hold, all subscriptions that belong to the account will also put on hold. During this time new orders will not be accepted if the account is released; all its Subscriptions are released. In this event, please inform purchasing and accounts payable immediately.

27. What I have to do if I get invoices from the vendors?

Forward to accounts payable right way. accountspayable@claflin.edu.

28. Do I have to check my budget every time before creating requisition?

Yes, certainly.

29. What is a negative encumbrance? Why it is so important?

A negative encumbrance occurs when funds are taken from an account line and it is over budgeted or

crossing the fiscal year, which can create an audit issue.