

Frequently Asked Questions for the College Community

1. Why do I need to enter a requisition before Purchasing will start a bid (quote, RFP, etc.)?

This is required as a way to ensure that funds are available in the budget before Purchasing takes the time to go through the bid process and it also serves as a way for the approvers that have oversight responsibilities for the department making the request are in support of the purchase. The solicitation process is very time consuming, not only to Purchasing staff, but also to the suppliers who respond.

2. How do I create a requisition when I don't know who the supplier will be or how much it will cost?

The requestor should use the dollar amount that has been requested and approved in the budget for the purchase. If the vendor is new, then use the New Vendor Add Form in CougarMart. If the purchase needs to be bid, then select the "To Be Bid" supplier listed in CougarMart on your requisition. The dollar amount and supplier can be changed after the bid is awarded and the order is created. The requestor should also provide a list of suggested suppliers, either in the Internal Notes section of the requisition, or as an Internal Attachment.

3. Why do I need to review the responses to the bids, isn't that Purchasing's job?

Purchasing's role in the solicitation is to make sure that the process is done within the parameters of state law, Board policies and District procedures, as well as ensuring that the process is conducted in a fair and open manner. Purchasing does not have the expertise to know if a particular item or service will meet the technical needs of the department, which is why the requesting department is required to make the recommendation. Purchasing also reviews the responses to ensure that all bids are in compliance with the terms and conditions that have been set forth in the solicitation.

4. Why do I need to attach the quotes to the requisition? Can't I just fax them to Purchasing?

Having the quotes attached to the requisition will expedite the purchase once it is received in Purchasing. It will also allow the approvers to view the quotes prior to approving the requisition. Quotes can be attached to a requisition that is already on the approval path (without having to send it back) by clicking on the Comments tab of the requisition, clicking Add Comment and attaching the file via the Add Comment screen. If you have a hard copy of a quote, the Konica Minolta copiers throughout the district have scanning functions so that you can scan the items to send to yourself and attach to the requisition.

5. Can I order items online?

Purchases can be made online by those individuals that have been provided with a procurement card (p-card) and in accordance with the policies and procedures stated in the Procurement Card Procedures Manual. P-card users are cautioned to ensure the online purchase is being made through a legitimate and secure site. Purchasers are responsible for ensuring that adequate funds are available within their budget prior to making any purchase with a p-card.

6. Can I use petty cash or a check request instead of doing a requisition?

In many instances, p-cards have replaced the need for petty cash and check requests. For those who do not have a p-card, Check Requests should be submitted to Accounts Payable via CougarMart in lieu of

submitting a requisition for the following items only: subscriptions, memberships, legal notices, reimbursable expenses & postage for bulk mailings.

7. Why can't I buy items like furniture and computers through Staples, Amazon or other punch-out suppliers?

The District has standards and contracts in place for these items that offer deeper discounts and provide for assembly and installation, when needed. When the District enters into a contract with a supplier for goods and services, the District is as obligated to using the contract as the supplier is to honoring their contract prices, terms and conditions.

Amazon uses third party vendors and private sellers; therefore, the integrity of a computer purchased through Amazon cannot be guaranteed. Viruses, malware and even ransomware could be encrypted on those printers/computers, which are connected to the District's network, and could compromise the safety and security of the District's information technology systems.

8. Why is the purchasing threshold determined by the entire requisition plus shipping costs, instead of the per item cost?

Basic accounting principles consider the full cost of acquiring the item(s) to be the actual cost.

9. Can I do a change order to increase a declining balance purchase order or do I have to do a new requisition?

Change orders can be done to a **declining balance** purchase order as long as the purchase order has not been closed due to the fact that the current amount listed on the order has been reached or exceeded. Requestors are responsible for monitoring the balance of these purchase orders to ensure that they remain open and available for their use when needed.

10. How do I know what contracts are available for use?

CougarMart houses many of the contracts that are available for your use. These can be in the form of a punch-out to the supplier's website or a hosted catalog that is maintained by the supplier, or a contract that has been loaded by the Purchasing staff. Our goal is to eventually have all contracts and contract items available in CougarMart. You can find contract pricing by using one of the Showcased Suppliers on the Home/Shop page of CougarMart, as well as by doing a keyword search from the Home/Shop page.

11. Why can't I make a purchase online or through a vendor, and then get paid for it later with a check request?

Controls on spending are put into place to ensure that the District observes fiscally sound business practices. Purchases of this nature may be made using a p-card in accordance with the policies and procedures stated in the Procurement Card Procedures Manual. P-card users are cautioned to ensure the online purchase is being made through a legitimate and secure site. Purchasers are responsible for ensuring that adequate funds are available within their budget prior to making any purchase with a p-card.

12. What do I do when a vendor won't accept a purchase order and I don't have a p-card?

Contact the Purchasing Department to discuss the purchase and we will help determine the best approach.

13. Why do I have to obtain three (3) quotes prior to entering my requisition?

In order to be a good steward of the tax payer's dollars, the District feels that there is value in receiving competitive pricing on purchases over \$10,000. The Purchasing Department does not have adequate staff to obtain all of these quotes, so we rely on the multiple departments that are making these purchases to provide those smaller dollar quotes. Three (3) quotes are only required for non-contract purchases between \$10,000 and \$49,999.99. Purchases made for items that are under contract or utilizing a cooperative purchasing contract do not require multiple quotes. Non-contract purchases under \$10,000 only require one quote to ensure that the pricing is current. Please ensure that the price is obtained from a current vendor provided quote and not an old quote with outdated pricing or a print out from a website.

14. How long does it take Purchasing to do a bid?

The amount of time it takes to process a bid, depends on several factors, including, but not limited to, current workload, complexity of the procurement, quality and detail of the specifications provided by the department and timing/time of the year. A formal quote that does not have to be advertised or go to the Board for approval, could take less than a month. Bids that have to be advertised and go to the Board for approval, could take as long as 3 months or more.

15. Why does the bid process take so long?

As stated above, the current workload could be heavy, certain times of the year are busier, the department doesn't provide adequate specifications, Board approval and advertising can all affect the length of time required for the bid process. Purchasing makes every effort to process bids in an expedient manner, but we also want to make sure that the bids are done correctly, without mistakes that can easily happen when the process is rushed.

16. When does the purchase have to be approved by the Board?

Board approval is required for purchases over \$100,000. Thresholds are determined by the aggregated amount spent within a 12-month period, District-wide. Board approval of the budget does not mean that the Board has approved the purchase.

**17. What do you mean when you say you need to follow the procurement requirements of the grant?
Why do I need to provide a copy of grant to Purchasing?**

Most grants have very specific requirements for procurement, which are generally stricter than the District's requirements. For example, federal grants require that the System for Award Management (SAM.gov) website be checked to make sure the vendor has not been debarred or suspended from receiving federal funds. The District's outside auditors look at grant funds very closely to make sure the various requirements of the grant have been met. Not following the procurement requirements of the grant could result in the loss of that grant funding.

Individuals that use their p-card for purchases for which federal grants will be used are required to check <https://www.sam.gov/SAM/pages/public/searchRecords/search.jsf> for vendor debarment or suspension, prior to using their p-card and must attach the results to their p-card reconciliation. Contact the Purchasing Department if you have questions about your results.

18. How do I force a vendor to give me a W-9 and why do I have to obtain this?

You shouldn't have to force a vendor to give you a W-9. Vendor's should understand that if they want to get paid, then they will be required to submit a W-9. It's a standard business practice for anyone they do business with.

19. Does my returned requisition have to go completely through the approval path again?

It depends on why it was returned. For example, if you're adding to the requisition and the cost is greater or you are changing the accounting, then it would need to go back through the approval path again. If it was returned due to an issue such as an incorrect contract clause being connected to the requisition, then we can expedite the requisition back to the approval level that it was at.

20. Can you return my requisition back to me to make corrections?

Your requisition can be returned by the approver at the current approval level, or certain Purchasing staff can assign the requisition to themselves and then return the requisition to the requestor.

21. Why does Purchasing sometimes bid my items out after I've already obtained 3 quotes?

State statute and Board policy require formal solicitations be issued by the Purchasing Department for purchases of \$50,000 and over. If you receive one quote that indicates the price will be over \$50,000, then create your requisition, attach that one quote, add a comment in the Internal Notes section of the requisition and when it gets to Purchasing, we will issue a formal solicitation, as required.

22. What do I do when an Open PO has no more money left?

Declining Balance POs automatically close when no funds are left, so you must create a new requisition!

23. What do I tell a vendor when they call or stop by my office to try and sell me something?

Refer all vendors to the Purchasing Department or to our website at www.collin.edu/purchasing. There are instructions and links to Vendor Registration on the website, as well as information on the staff member who handles the commodities or services that they sell.

24. How do I know if something is truly a Sole Source?

See the newly revised Sole Source Procurement Policy and always remember, “When in doubt, bid it out!” Contact the buyer that works with your department or that commodity for assistance.

25. I have been awarded funds through an Innovation Challenge grant. Why do I have to provide three (3) quotes or go through the formal solicitation process?

Innovation Challenge grant funds are provided by the District and therefore require the same procedures as operational budget funds. Please work with the Purchasing Department staff to determine what requirements need to be met prior to submitting a request for the funds. Just because a certain product or vendor is listed in the grant submission does not exempt the purchase from competitive procurement requirements. We’re here to assist you to ensure the procurement goes as smoothly as possible.

26. What do I do if I receive an agreement or contract that needs a signature?

If this is for a purchase that you will be submitting a requisition for then attach it to your requisition and the buyer will review it and get the required signatures. If it is for something you will not be submitting a requisition for, send it to the Contract Administrator in the Purchasing Department for review and signatures. The only individuals authorized to sign a contract, binding the District, are the President, CFO and the Director of Purchasing.