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University of Oregon Procurement Overview

Decentralized Purchasing

- Each University of Oregon (UO) department has the responsibility and authority to make purchases. Vendors must market directly with the departments.

Department Contact Information

- For department contact information, vendors can use the UO's online directory at: <http://www.uoregon.edu/departments.shtml> or purchase a telephone directory contact Telecommunications at (541) 346-1017.

University of Oregon's Competitive Requirements

\$25,000 or under	Direct Procurement - None
\$25,001 to \$100,000	Informal Procurement - Posting to Oregon University System (OUS) Website, Competition. http://www.ous.edu/about/bo/
\$100,001+	Formal Procurement – Posting to OUS Website and/or advertisement of formal competitive opportunities are placed in newspapers and trade journals or the Department of Administrative Services under Oregon Procurement Information Network (ORPIN). http://orpin.oregon.gov/open.dll/welcome

State of Oregon Contracts/Oregon University System/University of Oregon Price Agreements

- The UO can use State of Oregon contracts. State contracts are available at: <http://orpin.oregon.gov/open.dll/welcome> . The UO is not required to use the State of Oregon contracts.
- The UO posts solicitations to the OUS website for goods and services over \$25,000. <http://www.ous.edu/about/bo/>
- The UO also maintains UO Price Agreements with some high volume vendors. Price Agreements are posted on the University of Oregon's Purchasing web site at: <http://baowww.uoregon.edu/ProcurementContracting/listofuocontracts.htm> .

Timely Payments for Goods and Services

- The UO's decentralized automated purchasing and accounts payable system allows for efficient purchasing of and payments for goods and services.

University of Oregon's Purchasing and Contracting Services Contact Information

Catherine Susman
Director, Purchasing and Contracting Services
(541) 346-1255
susman@uoregon.edu

Deanne Lahaie-Noll
Purchasing and Contracting Services Assistant Manager
(541) 346-3156
deanneln@uoregon.edu

University of Oregon
Purchasing and Contracting Services
PO Box 3237
Eugene, OR 97403
(541) 346-2419
(541) 346-2425 fax

Cashiering

Conferences (UO Sponsored)

eCommerce

Financial Management

Food and Beverage (Hosting)

Gifts

International Visitors/Students

Payroll

 **Print/Copy Mail Services**

Procurement / Contracting

Property Control

Risk Management

Student Resource Aid

Surplus Property

Travel Administration

Travel

Unit Administrator Guide

 **Vice President FA**

Contracting Overview



- [Overview](#)
- [Special Approvals](#)
- [Department Responsibility](#)
- [Termination Notification](#)
- [Equipment Leasing](#)
- [Van Lines](#)
- [Real Property \(Space\) Rental](#)

[Use of DAS Contracts](#)

Overview

SPECIAL APPROVALS - DEPARTMENTS NEED TO ALLOW TIME TO OBTAIN

The following special approvals must be obtained, via the Business Office Contracts Manager, prior to any advertising or solicitation, and/or contract signature:

1. Requests for attorney services, audit services, or financial and bond counsel services.
2. "Interstate" (with other state governments or political subdivisions) and "international" agreements (with foreign governmental organizations).
3. Agreements with Native American Tribes must be approved PRIOR to signature or submission to the tribe.
4. Department of Justice/Attorney General approval as to contracts at certain dollar thresholds (and the formal solicitation documents which result in those contracts). See the link under Policy entitled [Contracts - Special House Bill 2321 Requirements](#) for specifics.

DEPARTMENTAL RESPONSIBILITY AFTER EXECUTION OF A CONTRACT

Once a contract is signed, the administration of the contract falls to the department. It is the department's responsibility to ensure payments are made/received as required, that performance/goods meet the requirements of the contract, that any restrictions are not violated (especially as to software), that the department complies with the departmental requirements of the contract, and to advise the Business Office Contracts Manager if they are having problems with the contractor in carrying out the intent of the contract.

NEW NOTIFICATION PROCESS REGARDING CONTRACT TERMINATIONS

Numerous contracts negotiated contain language indicating that the contract is effective "until terminated," or "until terminated with XXXXX days written notification". In addition, many contracts are "open-ended," in that they do not have any actual ending date, but end when the contractually required process is completed. THEREFORE, EFFECTIVE IMMEDIATELY, on those contracts which were signed by the Business Office, and for which a specific end date is not set forth in the contract, notify the Business Office Contracts Manager as follows:

1. If you receive written termination notice from the contractor.
2. If you intend to terminate a contract (do so in writing, with a copy to the Business Office Contracts Manager).
3. If the contract has been fulfilled and no further service or performance is required.

EQUIPMENT RENTAL/LEASING

Following review/signature of equipment rental/leasing agreements, the Business Office Contracts Manager will forward a copy to the UO Property Coordinator at Ext. 6-3163 to ensure the property is recorded on Banner records as required. The agreement will then be returned to the department.

DISCOUNTED VAN LINES MEMORANDUM

Synopsis of related links:

1. [FAQs, Contracting](#). Some basic questions and answers as to contracting and formal solicitations (Invitation to Bid - ITB and Request for Proposal - RFP).
2. [Forms, Contract Administration](#). Sample approved ITB and RFP forms and letters.
3. [Policy, Contracting, Contracts - Special ORS 291.047 Requirements](#). Sets forth rules as to special Department of Justice approval at certain dollar thresholds or contract types.
4. [Training](#). Information as to classes, training, and other informational options.
5. News. Keep up with notices as to the latest additions and revisions to policies, rules and procedures.
6. [Procedures - Invitation to Bid \(ITB\) and Request for Proposal \(RFP\)](#). Some basic questions and answers, and tips and comprehensive procedures as to ITB's and RFP's.
7. [Procedures - Leases](#). General information as to the leasing of "real" property.
8. [Procedures - Legal - General](#). Addresses special legal process procedures affecting faculty/staff.
9. Resources - Van Line Discounts. Sets forth the latest discounts and local agent contacts as to interstate van line moves.

For contract information, questions, preparation, or the preparation of any special waivers, releases, practicum agreements, or other contractual documents, contact the Business Office Contracts Manager at (541) 346-3149, or Email: EKOEHLER@UOREGON.EDU

Updated May 12, 2008

FIS PO Processing Procedures

Topics

- | | |
|---|---|
| ▼ Overview - FIS PO Processing | ▼ Personal Reimbursements |
| ▼ POs and Fiscal Year Issues | ▼ Commodity and Account codes |
| ▼ What does the printed PO look like? | ▼ Fixed Assets |
| ▼ PO Standard Terms and Conditions | ▼ Printing a PO |
| ▼ Authorization and Security | ▼ Changing a PO |
| ▼ Purchasing Rules | ▼ Paying a PO |
| ▼ Chart of Accounts Information | ▼ Canceling or Liquidating a PO |
| ▼ Layout of the FPAPURR PO form | ▼ Training Period |
| ▼ Special Instructions Text | ▼ Purchasing & A/P Personnel Contacts |
| ▼ Bill to /Ship to Address Codes | ▼ Logging on to TRNG for practice |
| ▼ Vendor Queries and Address Updates | |

Back to: [POs](#) [FIS On-line POs Class](#)

▲ Overview - FIS PO Processing

Purchase Orders (POs) are used by the UO to facilitate communication with vendors, to provide helpful accounting tracking information, and to help meet Oregon Administrative Rules (OAR) record keeping requirements. A PO with the attached "terms and conditions" is considered a legal document.

Purchase orders are required for all procurements exceeding a total value of \$5000. If these are paper POs they **must be submitted to Purchasing and Contracting Services for review and approval.** Electronic POs will be routed to them automatically.

FIS on-line POs are essentially interchangeable with the traditional "paper" University of Oregon PO which may still be used. The FIS On-line POs, however, create added value by:

- Beginning a "document trail" in FIS.
- Creating an encumbrance in the amount of the order.
- Bringing the purchase information forward when paying the order with a FIS invoice document.

One shortcoming of the on-line PO, however, is that when printed, it does not include the Purchase Order Standard Terms and Conditions statement. This should be provided whenever a PO is sent to a vendor. This document provides the legal and contractual language that protects you, your department, and the university. Click here to view and print the most current version - [Purchase Order Standard Terms and Conditions](#). This should be used to replace older copies. For more information, see the Purchasing and

Contracting Services website at <http://baowww.uoregon.edu/procurementcontracting.htm>.

An on-line PO can't be printed until it has been completed and has passed through the approval process. Once it has been approved, NO CHANGES can be made to the PO since it is now a historical snapshot of the original order. When invoices are paid against this PO, however, the purchasing information on the invoice document may be manipulated to accurately reflect changes made to this purchase.

▲POs and Fiscal Year Issues

It is important to note that the fiscal year used on the PO must be the same as the fiscal year used on the invoices that will pay for it. The fiscal year is controlled in these transactions by the transaction date. For example: A transaction date of **30-JUN-00** or before is in **FY00** and a transaction date of **01-JUL-00** or after is in **FY01**. Additionally, when canceling a PO encumbrance using FPAPDEL, the cancel date must also match the fiscal year of the PO being canceled. Typically all encumbrances are automatically closed by the system at the end of the fiscal year.

▲What does the printed PO look like?



UNIVERSITY OF OREGON

Page 1 of 1

PURCHASE ORDER # P0002008

Federal Tax ID #93-6001786

DUPLICATE

TO: Ad Art Design
1407 Cross St
Eugene, OR 97402-4104

SHIP TO: EMU Club Sports
University of Oregon
Eugene OR 97403
(541) 346-3733
(Show PO# on all papers/pkgs for this order)

Date of PO: 09-JUN-2004

FOB:

Terms:

Delivery Required:

BILL TO: EMU Accounting Office
Phone: (541) 346-6068
EMU Accounting Office
PO Box 3600
Eugene, OR 97403

Instructions to vendor: Invoice upon completion of this order only. Prepay all transportation charges unless otherwise stated. If transportation is billed as a separate item, receipted freight bill must accompany invoice. State of Oregon is not subject to federal excise tax. In addition to the conditions stated hereon this order is subject to the University of Oregon's Purchase Order Standard Terms and Conditions attached.

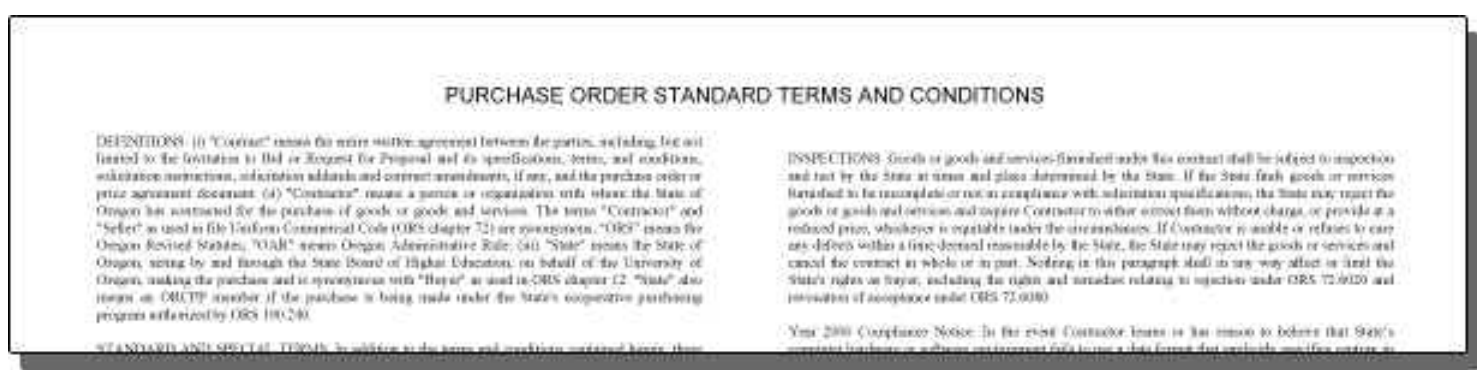
SPECIAL INSTRUCTIONS:

These uniforms must be in the UO Green and Gold. The front must be printed with the Ultimate Frisbee team logo. This is attached and will also be sent electronically. Each uniform needs to have a number printed on the back. This number needs to be between 1 and 30 with no duplicates. It does not matter which size has which numbers.
 Bruce Abrahamson 541-346-3032

<u>Item</u>	<u>Description</u>	<u>Quantity</u>	<u>U/M</u>	<u>Unit Price</u>	<u>Extended Price</u>
1	Uniforms for specification attached 5 extra large, 5 large, 5 medium, and 5 small.	20.00	EA	15.9900	319.80
DISCOUNT:					0.00
ADDL CHARGES:					0.00
TOTAL:					\$ 319.80

Authorized Signature(s) _____

Don't forget, you must also send the Purchase Order Standard Terms and Conditions with each PO! (see next page on handout)



▲Authorization and Security

To be authorized for entering POs, you must complete a [FIS/HRIS User Profile Form](#). This form requires a department head's signature and initials indicating specific authorization for FIS purchase orders entry.

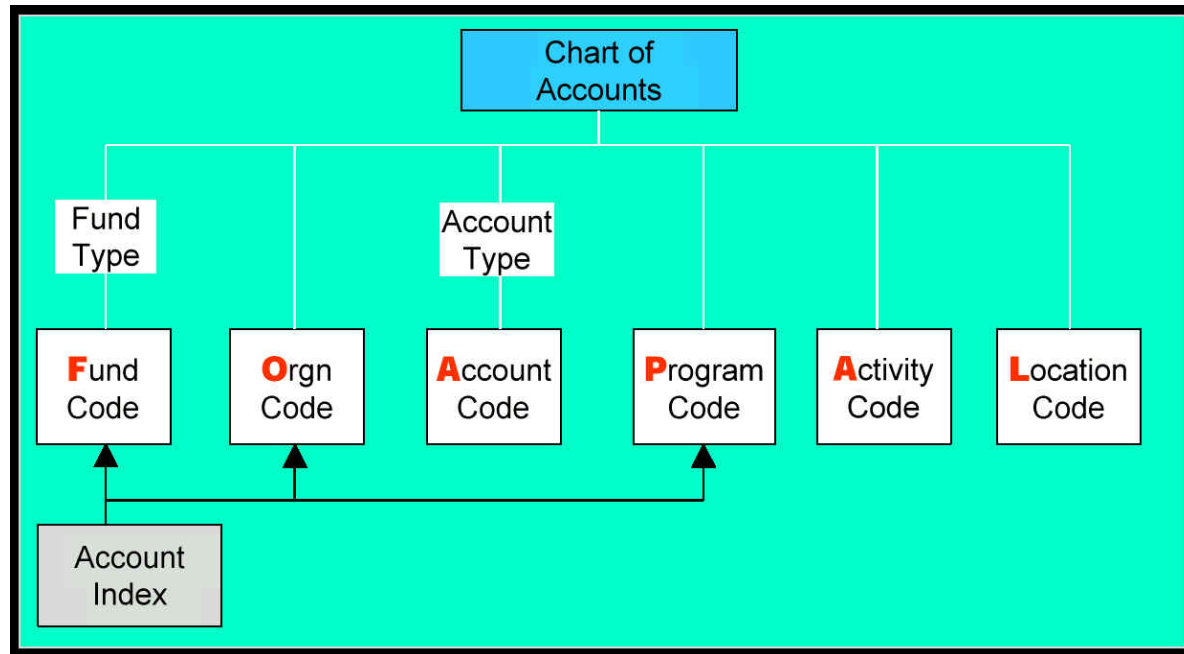
You will need to take the [FIS Introduction class](#) if you have not already. It is recommended that you also take [FIS Invoice Processing class](#) and graduate from the training period before undertaking POs. To learn the POs, you will take [FIS PO Processing class](#) which is followed by [FIS Paying On-line Purchase Orders class](#) if you intend to pay the invoices generated from your FIS on-line POs.

▲ Purchasing Rules

Before making a purchase, you should be familiar with the UO purchasing procedures and rules. You can find a brief synopsis of these rules at the following link - <http://bg.uoregon.edu/fis/ap/purchrul.htm>.

▲ Chart of Accounts Information

When entering the on-line PO, you will enter you department's Chart of Accounts codes in the Accounting Distribution block. The Chart of Accounts for U of O always defaults to a **B**. You will fill in Account Index to default your Fund, Organization, Program, (and sometimes Activity) codes. You will also assign an Account code representing the type of expense transaction you are using.




▲ Layout of the FPAPURR PO form

The graphic below represents the various blocks and key data elements of the FPAPURR PO form:

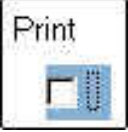
Sorry no graphic, yet.

▲ Special Instructions text

The Special Instructions text or "header text" screen of the PO is for both communication with the vendor and for internal documentation regarding your purchases:

For the Vendor - Add any special vendor communications here and leave the  default on for that line(s) to include this text on the printed PO under Special Instructions.

To create internal documentation (for purchasing guidelines and approvals, etc.) click to uncheck the

 default. The following guidelines will discuss the text that you will use to provide internal documentation in your "header text":

Note: The text you enter on the on-line PO does **not** need to be re-typed on the PO's invoice. Though this text will not be "brought forward" into your invoice like the rest of the purchasing data, people will be able to refer back to the original PO's text screens to get more details about the purchase.


- Start with your name and full phone number (including area code).
- Give the required supporting documentation to meet purchasing guidelines, for instance, and quotes when required.
- Explain any extenuating circumstances or unusual funding decisions in the case of unusual purchases.

Here are some specific text requirements:

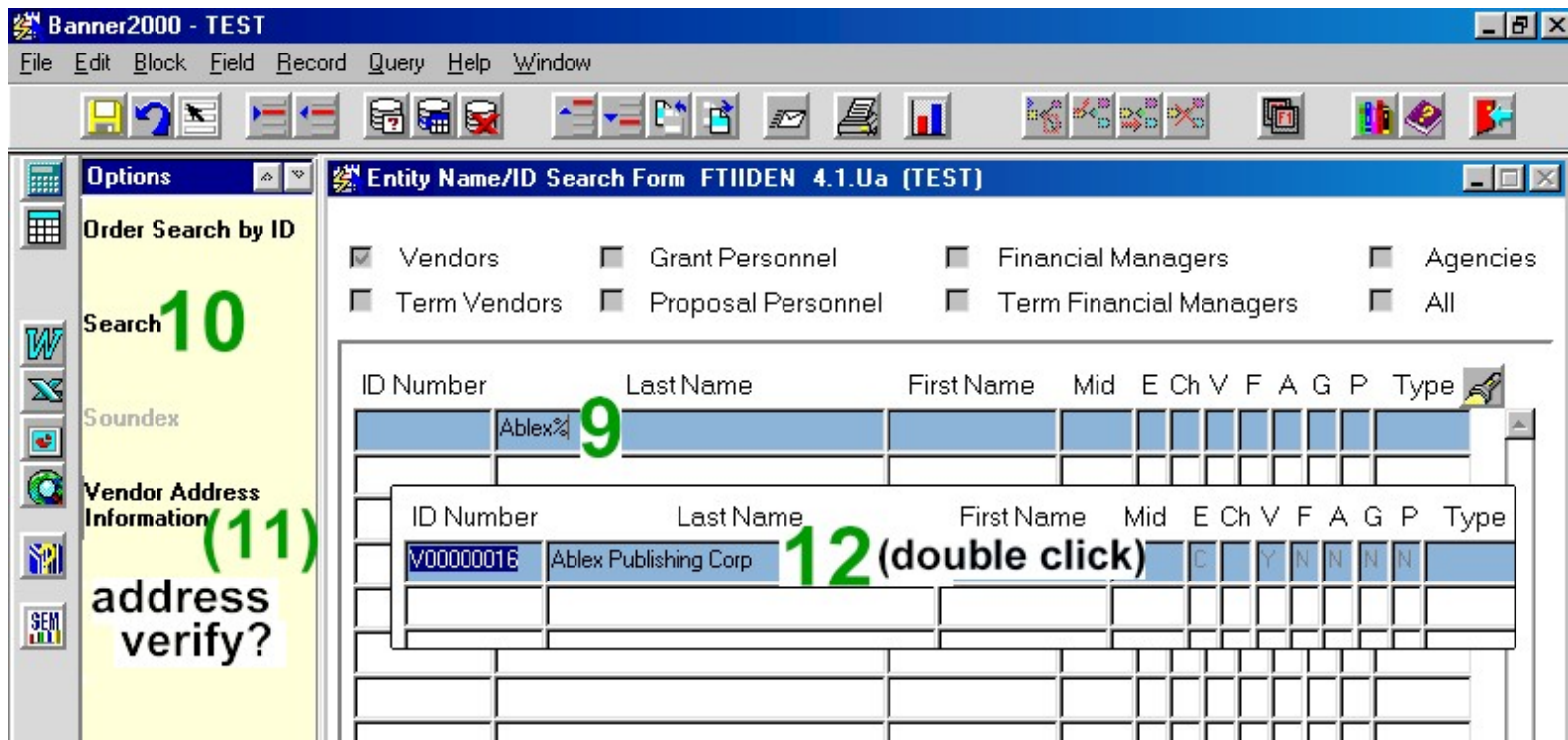
- **REIMBURSEMENT/DISBURSEMENT** - Describe items reimbursed such as postage, dates of subscriptions, etc.
- **CONTRACT RELEASE ORDER** - Include description and price agreement number. Put all info in text including CRO number. With the vendor's permission, the blue hard copy CRO can be eliminated.
- **STATE PURCHASE ORDER** - Include purchase description, information helpful to your department, and details required by Oregon Administrative Rules. Example: state price agreement number, quotes, cite competition exemption number form OAR if applicable, and justification if required.

- **PRICE AGREEMENTS** - We are not required to use DAS state price agreements. If you are using one for quote purposes or buying off contract, please include its number. University price agreements generally are not exclusive contracts. If using one, provide competitive quote information if required or exemption information.
 - **THE FOLLOWING PHRASE MUST BE PRESENT ON THE PURCHASE ORDER WHEN USING PRICE AGREEMENTS** - "This purchase is placed against State of Oregon solicitation #:_____ and price agreement #:_____. The contract terms and conditions and special contract terms and conditions (T's & C's) contained in the price agreement are hereby incorporated by reference and shall apply to this purchase and shall take precedence over all other conflicting T's & C's express or implied, except as regards any provisions relating to exclusivity of the contract. OUS is not bound by exclusivity provisions." (See [Use of DAS Contracts](#) for more information)

▲ **Bill to/Ship to Address Codes**

In order to print your **Bill to** and **Ship to** addresses on POs, you must complete the  [FIS Bill To Ship To Code Set Up Form](#) specifying these address along with codes for you to reference them during PO entry.

▲ **Vendor Queries and Address Updates**



When creating on-line POs, the vendor's address will appear on the printed PO. If you intend to mail the vendor this PO, be sure that this address is correct when creating the PO. You can verify that the correct address **exists** during the [Vendor Query](#) portion of your PO entry. You should also check that the correct

Address Sequence **defaults** on the PO during the [Checking the Vendor's PO Address](#) portion. Below are some guidelines for selecting the correct vendor and vendor's address.

First Attempt - When doing a PO [Vendor Query](#), start with the **first word** of vendor's name followed by a %. (i.e. for **Ablex Publishing Corp** try **Ablex%**.)

Second Attempt - Try being more creative with the query. Don't just assume that one way is the only way.

Example: McDonald or Mc Donald or Mc donald. Try all ways. Remember case sensitive!

There are also a lot of vendors in the file now that are "**dba's**". This means there will be a persons name in front of the business name.

Example: Alan Wagner/dba Craftsman Rubber Stamp.

In order to find these you will have to do a query that looks like this:

%Craftsman% - rather than just Craftsman%

For acronyms, you may use beginning and ending %'s.

Example: Learning Disabilities Association of America/LDA

Can be found with either **Learning%** or **%LDA%**.

It will take your query a little longer by using the % in the front, but it is the only way to find some of them.

If not found - If you really can't find the vendor you need, fax the Accounts Payable Department (**6-2393**) a copy of the invoice with a note on it saying "**new vendor**" and your name and phone number. If we don't know who it came from we can't call you if there are problems or questions. You don't need to send a cover sheet unless you can't find room on the invoice to put a note without covering something up. What you cover up may not seem important to you but it may help us. Our fax number is 6-2393.

PLEASE Do not send PO's, DR's, hand written or typed notes to set up vendors from. We can only do this in very rare instances such as refunds. We have to have something official from the vendor and that is generally their invoice.

If address has changed - If you have an address change for a vendor or think you do because the invoice shows a different address than what is on file, please send that to us (A/P fax - **6-2393**). We will verify the address and update it if need be. Some vendors have requested that ALL payments go to a certain address and we cannot change these. We will let you know if that is the case.

Reimbursements - If searching for a person, consider using both the Last and First name fields when possible. If you are reimbursing a student or an employee for something and you get the message

"NEEDS TO BE ACTIVATED BY ACCOUNTS PAYABLE", this means we have never activated them in the Accounts Payable system in order to issue them a check. If this happens you need to fax their **name, address and ID number (aka SSN)** to Accounts Payable. Our fax number is **6-2393**.

How soon will address requests take affect? - Please remember that we have until 5:00pm the following day of your fax to get these into the system. We get between 30 and 60 of these a day so please don't ask us to call you when we have them done. If there is a problem we will call you so you know what's going on.

If you find a vendor that has been **terminated**, look at the first address sequence for that vendor you may find the new vendor number that you should use. If not call Carmela and she can verify why the vendor is terminated.

Please direct your calls and e-mails concerning vendors to Carmela Kortum at 6-3126 or ckortum@uoregon.edu. She maintains the vendor file and is most familiar with it. You can also call Carolyn Wooley at 6-3158 if you can't reach Carmela.

Other Vendor Query Tips:

- Following the query, LIST (F9) to see existing addresses.
- Watch for **SEE VENDOR #####** forward messages!
- You may use Direct Access to navigate directly to FTIIDEN for querying in advance.

How can I identify Name Changes and Terminations of Vendors?

ID Number	Last Name	E	Ch	V	F	A	G	P
V00022508	Oregon Education Technology Consortium/O	C	I	Y	N	N	N	N
V00018967	Oregon Educational Technology Consortium	C	N	Y	N	N	N	N
V00018967	Oregon Educational Technology Consortium/	C		Y				
V00001045	Oregon Electric Service Inc	C		Y				
V00004695	Oregon Electro-Static Refinishing	C	N	Y	N	N	N	N
V00005101	Oregon Electro-Static Refinishing	C		T	N	N	N	N
V00004695	Oregon Electro-Static Refinishing/OER	C		Y	N			
V00025072	Oregon Emergency Management	C	N	Y	N			
V00025072	Oregon Emergency Management Association	C		Y	N	N	N	N

ID or Name is changed - Current will be substituted.

Terminated Vendor - Cannot be used.

▲Personal Reimbursements

Some differences between POs for vendor payments and personal reimbursements:

- The ID number of the individual being reimbursed will be used as the Vendor Code for reimbursements.
- The Address Code field of the header block should be MA (for vendor payments it's always VP).
- If the Address Code does not default to MA, or if you have any other problems addressing payments to an individual, contact Accounts Payable (6-3143) to verify that this individual has been set up to receive reimbursements.
- Use the "header text" to document reimbursement purpose and approvals.
- **You may NOT reimburse yourself!**

▲Commodity and Account codes

Commodity codes are used to evaluate university-wide purchasing trends and are therefore generally intentionally broad. This is in contrast to the more specific account codes that you will use later on in the accounting block. **It is VERY important to select the proper ACCOUNT CODE because there is internal processing based on this code. Please avoid using any of the "miscellaneous" account codes.** For more information on using account codes, see the [Codes](http://bg.uoregon.edu/fis/ref/codes/account.htm) section of the FIS Guide at <http://bg.uoregon.edu/fis/ref/codes/account.htm>.

Always look for an appropriate commodity code. Keep in mind that these codes are very general categories which are helpful for administrative analysis. They are generally not intended to be specific.

[See commodity code frequently asked questions.](#)

If you don't find a satisfactory one use a miscellaneous code.

Example: There are no specific commodity codes for some purposes such as subcontract payments. Use **961 Miscellaneous Services. Miscellaneous Products 578** is also available if you cannot find an appropriate product code.

For a complete list of the commodity codes, see the [Codes](http://bg.uoregon.edu/fis/ref/codes/account.htm) section of the FIS Guide at <http://bg.uoregon.edu/fis/ref/codes/account.htm>.

To create multiple commodity or accounting records, NEXT RECORD (down arrow). If you are purchasing Fixed Assets, you must create a different commodity record for each item being purchased - even if you use the same commodity code for each.

▲Fixed Assets

Fixed Assets are items purchased that will go into the FIS inventory system. They use the **Fixed Assets** account codes for capital outlay:

Capital Outlay codes: [40X Non-Proprietary](#) [A8X Proprietary](#).

When creating a PO and/or invoice for Equipment/Fixed Assets, you must create **one commodity record for EACH ITEM** being purchased even if these items are the same commodity.

Also, when inputting a PO using a capital account code, **DO NOT** use any other account code(s) on the document.

You do **not** need to put the fixed asset text on your PO, but you will need to enter it when you pay a fixed assets invoice. For more info, see <http://bg.uoregon.edu/fis/ap/inv.htm#fa>.

For more information regarding Fixed Assets Equipment Inventory at the U of O, contact Property Control Manager **Bob Swanson** at **346-3163** - swanson@uoregon.edu or see [BAO Property Control page](#).

▲Printing a PO

Once an on-line PO is both completed and approved, it may be printed using the FWIORPT screen. Please see [PO Printing - FWIORPT](#) instructions.

▲Changing a PO

Once an on-line PO has been approved, NO CHANGES can be made to the PO as it is now a historical snapshot of the original order. When invoices are paid against this PO, however, the purchasing information on the invoice document may be manipulated to accurately reflect this purchase. Please see [FAAINVE \(Regular\) - Invoices Paying On-line POs](#) instructions for more on paying POs.

▲Paying a PO

Once an on-line PO is completed and approved, it may be paid with a FIS invoice document. Please see [FAAINVE \(Regular\) - Invoices Paying On-line POs](#) instructions.

▲Canceling or Liquidating a PO

PO's **with no** payment activity can be canceled. Please see [FPAPDEL - Canceling a PO Encumbrance](#). POs **with** payment activity can have the remaining encumbrance balance liquidated. Please see [FGAJVCD - Liquidating a PO encumbrance](#).

▲ Training Period

Following the completion of [FIS On-line POs class](#), you can receive access to enter POs in production on a trial basis. This is considered the training period.

During the training period:

- **Getting Started** - You may begin entering POs once your authorization has been completed (usually a day after we receive your signed paperwork). See [authorization](#).
- **Do not enter travel reimbursements or personal service contracts (PSCs)**. Please continue sending these to the Business Affairs Office.
- **Coding Accuracy** - Use the most appropriate commodity and account codes that you can. Keep in mind that accuracy is especially important in selecting the **account codes**. Commodity codes, however, are intentionally very broad, and you may not find an exact fit. Pick the best or provide a description in the Desc: field. Remember that the [FIS Codes](#) is an additional reference.
- **Electronic Review** - You do **not** need to send any paperwork to the Business Office, POs will be approved electronically.
- **Approval Timing** - Your POs should be reviewed and approved on every hour (10:00am, 11:00am, etc). Remember that you cannot print the POs until they are approved and posted. See [Printing](#).
- **Disapproval** - Disapproved POs will create BANNER messages. See **FIS Guide: Intro - FIS General Information** - [BANNER Messages](#) for more information.
- **Fixing** - To fix a disapproved PO, return to **FPAPURR** and enter the PO Document #. This will allow you to fix and re-complete the PO.
- **Questions?** - If you have any questions while you are in the training, please call Judy (**6-2387**).
- **Graduation** - You will be notified once you "graduate" from the training period (after doing 15 POs). This means that you will no longer have to wait an hour for approvals (for POs under \$5000), they should go through approvals about every 15 minutes.

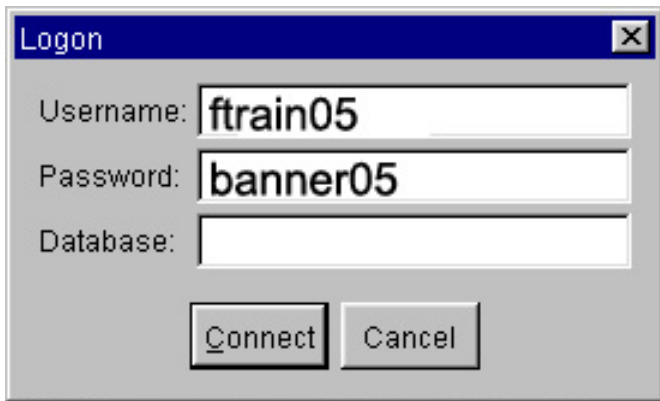
▲ Purchasing & A/P Personnel Contacts

<p>Purchasing and Contracting Services (Purchasing guidelines)</p> <p>http://baowww.uoregon.edu/procurementcontracting.htm</p> <ul style="list-style-type: none"> ● Main Number - 6-2419 (Fax - 6-2425) ● Deanne Lahaie-Noll - 6-3156 (Commodity questions) ● Lynne Harrell - 6-3220 ● Cathey Susman - 6-1255 (Training & Service issues) 	<p>Accounts Payable (Vendors and Checks info plus Travel Coordination)</p> <p>http://baowww.uoregon.edu/invoicepayments.htm</p> <ul style="list-style-type: none"> ● Main Number - 6-3143 (Fax - 6-2393) ● Dan Patten - 6-4235 ● Carolyn Wooley - 6-3158 ● Connie Isaacs - 6-0812 (Account Codes) ● Carmela Kortum - 6-3126
<p>If you need help while you are in the FIS PO training period, first try to call</p> <p>Judy Fossum - 6-2387</p>	

▲ **Logging on to TRNG for practice**

You should consider practicing these documents before using the production system. To do this, you may login to the "training" system at any time. To login to **TRNG**, use one of the training ID's: **FTRAIN01-18** with passwords of **BANNER01-18**. For example:

Start by going to the [Banner Guide training home page](#). Then follow the link above the EFT Schedule and enter the login information as follows:



Back to: [POs](#) [FIS On-line POs Class](#)

[Banner Home](#), [SIS](#), [FIS](#), [HRIS](#), [Help Desk](#), [Training](#), [Map](#), [Search](#), [Data Warehouses](#)
[Introduction](#), [Journal Vouchers](#), [Invoices](#), [Purchase Orders](#), [Encumbrances](#), [Queries](#), [Codes](#), [Forms](#), [Reports](#),
[Glossary](#)



Note: *This electronic document supersedes all previous versions and is subject to change.*

Contact: *CJ Nelson, Business Affairs cnelson@uoregon.edu*

URL: *<http://bg.uoregon.edu/fis/fis.htm>*

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Professional Service Contracts (PSC)

[Forms](#)

[Personal Service Contracts \(OAR 580-062\)](#)

[PSC Competition and Approvals](#)

[PSC Decision Tree](#)

Professional Services Contracts must be used for services from independent contractors which call for:

- specialized skills,
- highly technical or scientific expertise, or
- the exercise of professional or artistic discretion or judgment

PSCs are not required if there is no payment for services. For example a department pays for the travel for a guest lecturer, but does not give an honorarium. A PSC should not be issued.

Examples of services requiring a PSC:

- consultants
- artists
- musicians

- guest lecturer
- photography

Examples of services that do not require a PSC (trade services):

- repair and maintenance
- data entry
- caterer
- plumber
- translation
- proofreader
- editing for spelling or grammar

Updated May 12, 2008

- [Lost or Stolen Procurement Card](#) (FAQ page)
 - [Procurement Card Quiz](#)
 - [Important Reminders](#)
 - [Summary of Tax Reportable Account Codes](#)
 - [Incorporated Service Vendors Exception List](#)
 - [Request For Visa Application Form](#)
 - [US Bank Visa Card Update Form](#)
 - [UO Procurement Card Signature Authorization/Agreement](#)
 - [P-Card Signature Authorization Agreement](#)
EFFECTIVE 7/1/08
 - [P-Card Training Registration](#) EFF 7/1/08
-
- [Visa Procurement Card Activity Log](#)
 - [US Bank Dispute Form](#)
 - [P-Card Pre-Review Information](#)
 - [P-Card Review Checklist](#)

Overview


OUS (Oregon University System) has established a procurement card program. This program provides for the rapid acquisition of primarily low dollar items. The procurement card program is designed to promote purchasing efficiency, flexibility, and convenience. Procurement card purchases shall be made in accordance with established purchasing rules and policies. The procurement card program is administered by the OUS and is implemented at the institution level.

OUS has contracted with U.S. Bank to provide Visa credit cards, called procurement cards. The procurement cards may be used to purchase goods and non-tax reportable services for the institution.


Benefits of the procurement card program are reduced time, paperwork and handling costs along with a more rapid and efficient receipt of goods. By using the procurement card the traditional requisition pricing order placement delivery of goods invoice voucher review payment cycle is greatly reduced.

U.S. Bank issues procurement cards to UO campus departments. Each card is assigned to a department Custodian. The Custodian maintains documentation, reconciles the bill on a monthly basis, and ensures that the card is used only for authorized purchases.

How To Obtain a Visa Procurement Card

1. Fill and print the  [US Bank Visa Card Information Sheet](#) and send it to PCS/Deanne via campus mail, or fax to PCS at 346-2425.
2. The [Program Administrator](#) will fill out the US Bank Application and return it to you to obtain signatures from the intended [Card Custodian](#) and the [Unit Administrator](#) (Dean, Director, Department Head, Manager).
3. Mail the signed US Bank Application back to PCS / P-Card Program Administrator.
4. PCS will notify you when the card arrives, usually 5-7 business days from the day they receive the application.
5. If the intended Card Custodian has not been trained by PCS in the role of Custodian during or after April 2000, he or she will need to contact Deanne Lahaie-Noll at 346-3156 and make a training appointment. It typically takes less than one hour and covers important details about policies and standards for procurement card use, maintenance and documentation.

Note: This training must be completed prior to receiving your visa card from PCS/ Procurement Card Program Administrator. When a Card Custodian terminates/ separates from a department, all procurement card activity shall stop until a new Card Custodian is identified and trained by PCS.

- ~~6. The  [UO Procurement Card Signature Authorization/Agreement](#) must be completed and signed by the Card Custodian and Unit Administrator prior to receiving your card.~~

If you have any questions about this process, please call the Program Administrator at 346-3156 or e-mail deanneln@uoregon.edu

Procurement Card Liability Insurance

Now that the Procurement Card can be used for common carrier charges (such as airline, bus and train fares not including taxis and airport shuttles), insurance issues need to be addressed.

There is no travel or accident insurance if the Procurement Card is used for common carrier charges.

If travelers purchase their own travel accident insurance, the University of Oregon will not reimburse the expense of the insurance.

If you use the Corporate Travel and Entertainment Card or the Central Travel System Accounts, both of

these provide accident insurance coverage.

Questions concerning using the Procurement Card please contact Deanne Lahaie-Noll at 6-3156 or Lynne Harrell at 6-3220.

Questions concerning travel can be directed to Carolyn Wooley at 6-3158.

Updated June 13, 2008

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ITB / RFP Preparation

[Procedures and Tips](#)

 [Instructional Guideline Invitation to Bid \(ITB\) Form](#)

 [Instructional Guideline Request for Proposal \(RFP\) Form](#)

 [Sample Letters, Advertisements](#)

 [Sample Amendment](#)

 [Sample Evaluation Sheet](#)

 [Evaluator's Conflict of Interest Statement](#)





"Standard Contractual Requirements - Solicitation Attachment,"

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Leases - Real Property

Leases must be prepared/approved and signed by the Business Office Contracts Manager.

New procedures and approval queues have been implemented. These new procedures and approval queues will require additional time; therefore, you should contact **Purchasing and Contracting at (541) 346-1121** or Email kmcqueen@uoregon.edu as soon as you contemplate entering into any real property leases, whether as Lessee (renter) or Lessor (landlord).

Please see the procedures for acquiring [off-campus space](#).

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Legal - General

Subpoenas. If you receive a subpoena, notify Melinda Grier, Legal Counsel to the UO President, immediately.

Summonses and Complaints. The following is excerpted from February 28, 1995 memo from Melinda Grier to Institution Presidents.

1. When a summons and complaint is delivered to an institution office, institution staff should attach a note indicating the date and time the papers were received and send copies to the Department of Justice, Trial Division, Salem, OR, and to Melinda Grier. Melinda Grier should be notified immediately and she will handle it. This applies as well to acceptance of service of temporary restraining orders.
2. Sometimes complaints are "served" by mail delivery. If one arrives by certified mail, return receipt requested, you may sign the postal receipt. You should then follow the same process as for personally delivered summonses set forth above.
3. Occasionally institutional officials or their staff are asked to sign papers accepting service. As Oregon State court rules dictate that papers are only correctly served on the Attorney General's office, the Department of Justice Trial Division, has requested that only Trial Division Assistant Attorneys General sign Acceptance of Service forms.

4. Whenever you are served with a Summons and Complaint, please examine the papers to determine if they include a "temporary restraining order (TRO)". If the papers include a TRO, please notify Melinda Grier immediately. If Melinda Grier is not available, notify the Department of Justice, Trial Division, Salem, OR.

Garnishments.

1. Garnishments (inquiries and documents) relative to UO "employees" are to be referred to Payroll.
2. Garnishments (inquiries and documents) pertaining to vendors with whom the UO has contracted are to be referred to Melinda Grier, Legal Counsel to the President.

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Use of DAS Contracts



- [Overview](#)
- [Mandatory Purchase Order Language](#)

Overview

Oregon University System (OUS) and the Department of Administrator Services have signed a two-year agreement allowing the continued use of state contracts. In keeping with the Higher Education Efficiency Act (SB 271), you may use these contracts but you are not required to use them. Many of you currently use DAS state contracts and access contract information via the DAS Oregon Procurement Information Network (ORPIN).

If you use DAS state contracts, no further competition is required regardless of dollar amount. The formal competitive process has already occurred. However, there is no guarantee that DAS contracts offer the "best value." Buy responsibly, check to ensure you are receiving the "best value."

As a reminder, you may [CLICK HERE](#) to view UO Contracts/Price Agreements. While DAS may use the same vendors in some cases, the vast majority of the UO prices and/or terms are better when comparing the same items.

Mandatory Purchase Order Language

If you use a DAS state contract, you **MUST** add the following language to the purchase order in order to obtain the state price. This is also required by the OUS/DAS agreement:

"This purchase is placed against State of Oregon solicitation #: _____ and price agreement #: _____. The contract terms and conditions and special contract terms and conditions (T's & C's) contained in the price agreement are hereby incorporated by reference and shall apply to this purchase and shall take precedence over all other conflicting T's & C's express or implied, except as regards any provisions relating to exclusivity of the contract. OUS is not bound by exclusivity provisions."

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Photocopier Purchase/Lease Procedures



-  [University of Oregon Photocopier Acquisition Form](#)
- [Vendor Quote Worksheet](#)
- [Sample Vendor Quote Worksheet](#)
- [Purchase Order Standard Terms and Conditions](#)
 - [IKON](#) - Current Contracts
 - [Imagistics](#) - Current Contracts
 - [Ricoh](#) - Current Contracts
 - [Savin](#) - Current Contracts
- Any questions or problems please contact Purchasing and Contracting Services at 346-3156.

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Warranties and Reimbursements on Equipment

Reminder: Warranties represent substantial value to the University. This is especially true of many electronic products, such as, computers, fax machines, copiers, printers, software, etc. If the particular machine is a "lemon" or you have problems during the warranty period, you want to be sure that you have recourse.

Please note, many products listed above do NOT allow warranty transfer from owner to owner. When an individual purchases these items via a personal credit card or check, the warranty goes to the individual. When the department buys the item from the individual via reimbursement, ownership transfers to the University of Oregon. Often the warranty does NOT transfer. This is a tremendous loss.

We recommend that you do not allow an individual to purchase these kinds of products intending to reimburse them. We recommend that you use a Purchase Order or use your department "procurement card", ensuring that the warranty stays with the University.

This enhances our chances for recourse if the equipment fails.

If your department does not have a "procurement card" and you wish a departmental application, you may view information about the [procurement card program](#) at our Web site and download an application request.

For more information about the procurement card program:

Call: Deanne Lahaie-Noll, 6-3156 or email deanneln@uoregon.edu

For questions regarding the procurement card request forms:

Call: Lynne Harrell, 6-3220 or email lharrell@uoregon.edu

For questions regarding reimbursement:

Call: Carolyn Wooley, 6-3158 or email cwooley@uoregon.edu

Purchasing and Contracting Services
541-346-2419 phone
541-346-2425 fax

Revision Date: March 15, 2004

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Purchasing Ethics

Purchasing Ethics

Basics of Ethics Law

As employees of the state of Oregon, faculty and staff of the UO must follow all of the state statutes and regulations regarding ethics and conflicts of interest.

[ORS Chapter 244](#) *Government Standards and Practices*, is the State of Oregon code of ethics.

Among other things this chapter defines conflict of interest, potential conflict of interest, and states that no public official shall use or attempt use their official position or office to obtain financial gain or avoidance of financial detriment. Public officials include, but are not limited to all state employees.

ORS 244 also states public officials shall not solicit or receive, during any calendar year, any gift or gifts with an aggregate value in excess of \$100 from any single source who could reasonably

be known to have a legislative or administrative interest in a governmental agency in which the official exercises authority.

Employees involved in purchasing activities or decisions have the responsibility to promote positive vendor relationships through impartiality in all phases of the purchasing cycle.

Employees should exercise caution and good judgment if offered a gift from a vendor.

Personally accepting gifts from vendors may give the appearance of impropriety. Accepting gifts, entertainment, food, or other items of value before, during, or immediately after a purchasing process or when it may influence a purchasing decision should be avoided.

Code of Ethics

[UO OAR 571-040-0020](#) Code of Ethics, is part of Division 40 of the UO OAR, Competitive Procedures for the Purchasing, Procurement and Contracting of Goods and Services. The chapter states among other things that university employees in contracting and purchasing must:

- Give first consideration to the objectives and policies of OUS and the UO.
- Strive to obtain the best value for expenditures.
- Fairly consider prospective contractors insofar as state or federal statutes and institutional rules and policies require.
- Conduct business in an atmosphere of good faith.
- Demand honesty in representations made by prospective contractors.
- Demonstrate support for emerging small, disadvantaged, and minority-owned and women-owned business and QRFs.
- Comply with ORS 244 and other applicable conflict of interest policies that may be more restrictive.
- Refrain from knowingly engaging in any outside matters of financial interest incompatible with the impartial, objective, and effective performance of duties.
- Receive written consent of originator of proprietary ideas and designs before using them.
- Foster fair, ethical and legal trade practices.

Fairly considering prospective contractors and conducting business in an atmosphere of good faith means you should not disclose prices to competitors during a purchasing process or attempt to have vendors lower their prices to beat another vendor's quotation.

UO Ethics Purchasing Policy - Doing Business with UO employees

<http://baowww.uoregon.edu/ProcurementContracting/ethicspcs.doc>. Do not purchase from UO employee, unless it can be clearly documented that the purchase is clearly in the best interest

of the UO, results from competition and represent the best value. Regardless of dollar amount, departments should be obtaining competitive quotes or documenting sole source exemption.

If the potential purchase involves services, then an independent contractor analysis may also be required to determine the appropriate method for obtaining the services.

Additionally, no employee should have influence over the purchase, solicitation, award, payment nor expenditure approval of a product or service, if their action would financially impact the employee, the employee's relative, or the employee's relative's business.

Updated May 12, 2008

Campus Business Services

Fiscal Year 2005 in Review



Business Affairs Office
University of Oregon

Campus Business Services
Fiscal Year 2005
Year in Review

FY 2005 Year in Review is the annual report from the Campus Business Services (CBS) division of the Business Affairs Office. This report is intended to give the campus community a brief look at some of the major business functions of the university that support our mission to provide education, research and public service. The division consists of accounts payable, payroll, purchasing, and contracting services.

The University of Oregon is a tremendous revenue resource to our community.

- We pay an average of 8,000 employees every month. Our total labor expenses were \$268.6 million in FY 2005. In addition, \$51.4 million went directly to students for stipends and other financial aid.
- Of the \$142 million in invoice payments, \$48.6 million, or 35%, were made to vendors in Lane County.
- We paid 99,723 invoices, 7.4% from the UO Bookstore. Our credit card provider was the top vendor by dollar amount, and a local construction company was second.

The CBS division made improvements to achieve efficiencies and better service for campus. This report highlights our policy, procedure, and technology initiatives. Many of our achievements are made collaboratively with other departments, and we appreciate your participation.

My personal thanks to the 23 employees of CBS, and specifically to the following for their significant contributions to this report: Krista Borg, Shelby Cooper, Judy Duff, Lynn Harrell, Eileen Koehler, Deanne Lahaie-Noll, Harriet Merrick, Dan Patten, and Carolyn Wooley.

Nancy Cameron
Associate Director
Campus Business Services
Business Affairs Office

Accounts Payable

Achievements FY 05

Simplified the airfare approval process.

- Combined two forms into one.
- Reduced the number of users requiring pre-approval from Accounts Payable.

Reduced steps required for processing student stipend payments by allowing direct entry by departments.

Developed and updated written procedures.

- New reporting requirements for information technology expenditures.
- Outgoing wire transfers and foreign bank drafts on-line forms and instructions.
- Special handling items, check pickups, and hold items instructions.

Eliminated manual tracking of short form professional service contracts.

Created a reference guide for end of year cut off procedures.

Managed the FIS invoice training queue.

- 55 employees completed the training period.
- 1,959 documents reviewed.

Automated notification process to holders of outstanding checks explaining how to obtain a replacement check before the funds are turned over to the State Lands Division.

Accounts Payable Effort

- | | |
|--|---------------|
| • Checks issued | 93,601 |
| • Direct deposits – FY05
FY04 20,418 (5% increase) | 21,434 |
| • Total vendor invoice payments | \$142,328,832 |
| • Imaged documents
FY04 153,166 (Decrease due to A/P and Payroll checks now imaged by
US Bank) | 27,642 |
| • Invoices reviewed and approved by A/P | 4,818 |
| • Short form PSCs processed | 1,189 |

- Long form PSCs payments entered 995
- International students counseled on scholarship filing obligations 103
- Checks scheduled to be purged and turned over to State Lands Division.
 Located vendors and reissued 95 checks:
 - Accounts Payable 41 \$12,932
 - Student 54 18,720 \$31,652
- New vendor set-ups 3,822

Vendor Information

Top vendors by dollar amount

1. US Bank	\$6,164,519
2. John Hyland Construction	\$5,275,848
3. EWEB	\$5,015,405
4. GTF Federation	\$3,037,619
5. IGI Resources Inc	\$2,816,341

Top vendors by number of invoices (percentage of total)

1. UO Bookstore	7,405	(7.4%)
2. Boise Cascade	6,651	(6.7%)
3. IKON Office Solutions	2,246	(2.3%)

Vendor Location

Local Oregon*	\$48,604,431	(35%)
Total Oregon	\$66,291,337	(47%)
Total invoice payments	\$142,328,832	

* Local Oregon is all zip codes beginning with 974xx. This includes all of Lane County and portions of Benton, Linn, and Douglas Counties.

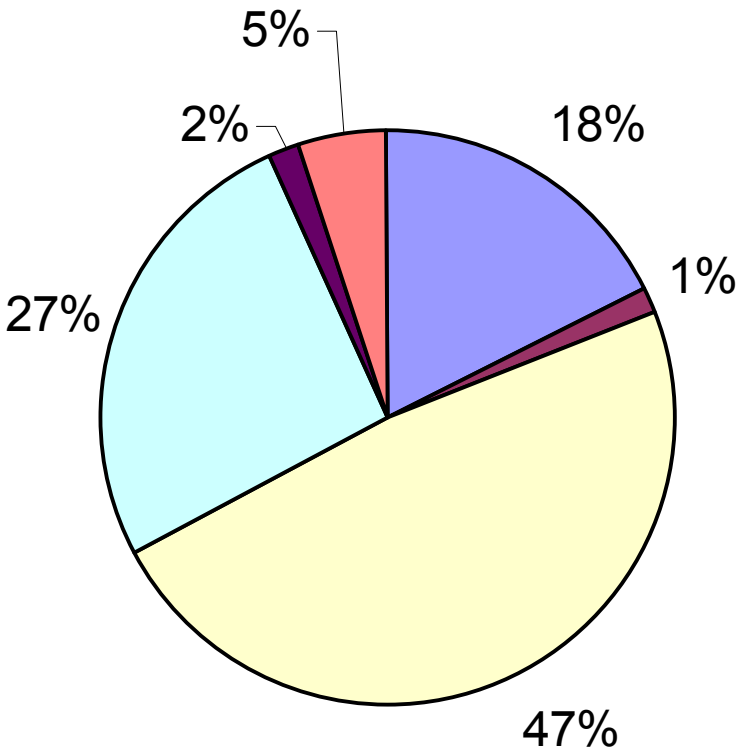
Travel

- Travel reimbursements approved by departments – FY05 5,784
FY04 4,190 (37% increase)
Of these documents 540 were reviewed by A/P after the payment was made.
- Travel reimbursements reviewed and approved by A/P – FY05 3,141
FY04 4,513 (30% decrease)
- Total travel reimbursements 8,925
- Total campus electronic travel form users 269
- Total certified campus travel administrators 84
- Total travel expenditures FY05 \$9.8 million
FY 04 \$10.5 (7 % decrease)

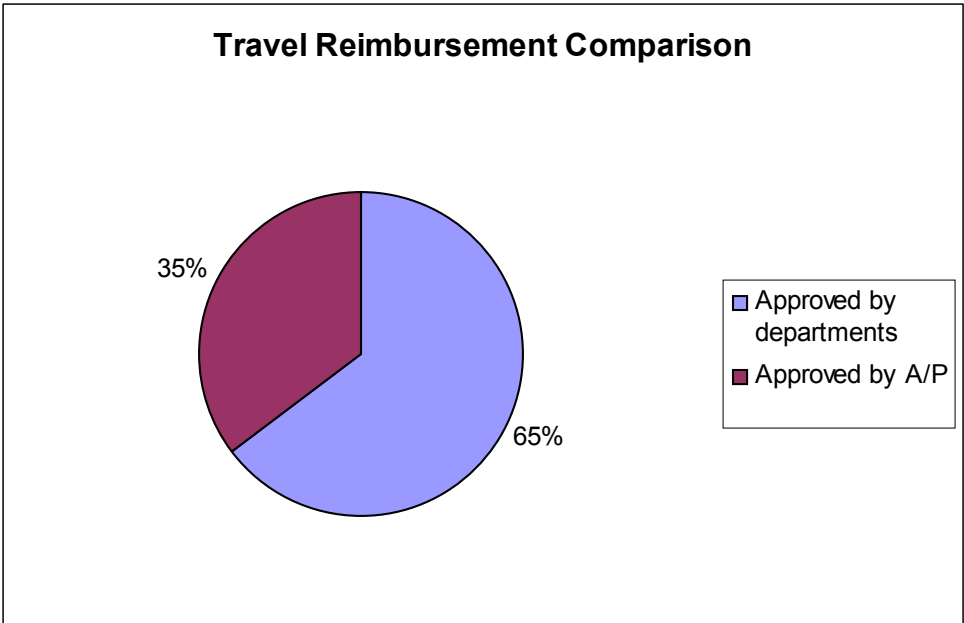
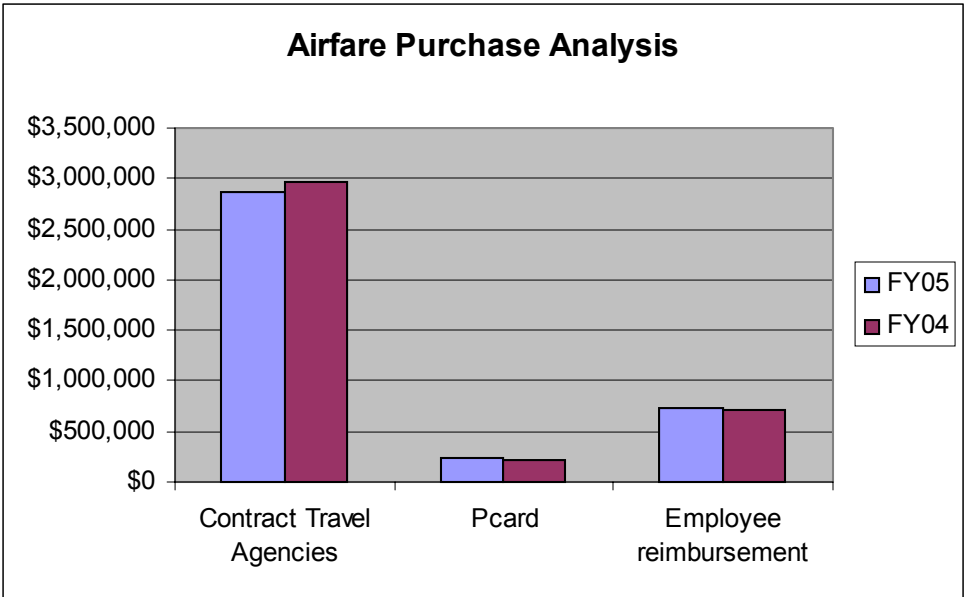
Federal Reporting

- 1099's issued 1,537
 - Independent Contractors \$20,438,530
 - Rents \$1,136,498
 - Med & Health \$514,448
 - Royalties \$280,658
 - Other Income \$125,218
- W-9's processed 1,400
- 1042S's issued 165
 - Scholarships reported \$862,987
 - Taxes withheld \$18,693

FY 05 Expenditure Percentages (\$millions)



- Capital construction payments (\$34.5)
- Procurement cards (\$2.5)
- Other invoice payments (\$92.5)
- Payments to students (\$51.4)
- Personal service contracts (\$3.0)
- Travel (\$9.8)



Payroll

Achievements FY05

Encouraged use of paperless earning statement on DuckWeb

- Employees may now view or print an identical earning statement to the one previously sent campus mail at month-end.
- A check box on DuckWeb allows employee to either receive or not receive a printed earning statement each month.

Developed enhancements to Banner and Banner Reports

- Implemented process to direct deposit manual checks.
- With ORM and CC, developed an automated salary increase process for unclassified employees.
- Improved the automated pay calculations on the Payroll Request form (PRF).
- Added contracted annual rate or "Base Rate" to Banner form (PWIVERI) for both unclassified and GTF employee classes.

Increased expansion of electronic processing and move to a paperless office

- Initial pay documents for unclassified employees are now sent electronically to the Payroll Office.
- More departments were trained to process electronically labor distribution changes, hourly rate changes, and terminations for student payroll.

Training

- Created a new Student Payroll/Work-Study Workshop.
- Revised curriculum of core HRIS workshops.
- Continued maintenance and added new sections to on-line manual, the Banner Guide.
- Continued bi-monthly HRIS Large Group Meetings, which included speakers from HR, ORM, and Financial Aid.

Web-Based Implementations

- Beta tested and implemented the new PEBB web-based management system.
- Provided feedback to PERS on the functionality of their new PERS Clarity System.

Monthly Payroll

- Total original pay events 95,516

Original events occur during the regular payroll and are paid out on payday.
- Average monthly employees on payroll 7,960
The monthly payroll varied between 8,168 and 8,879 employees during the regular academic year, dropping to a low of 5,816 employees paid in August.

- Average monthly payroll by employee class:

Unclassified (Teaching)	1,571
Unclassified (Non-Teaching)	902
Classified	1,351
GTF	1,338
Students	3,213
Temporary	291
GCIU	17

Manual Checks

- Total manual checks – FY05 6,242
 FY04 5,736 (8.8 % increase)
- Monthly average 520
 FY04 478
- Highest number of manuals in one week (September 04) 370
- Manual checks as a percentage of total pay 6.1%
 FY04 5.7%

Labor Redistributions

- Total labor redistribution events – FY05 23,207
 FY04 11,124 (108% increase)

Direct Deposit Information

- Payday direct deposit participation 80.6%

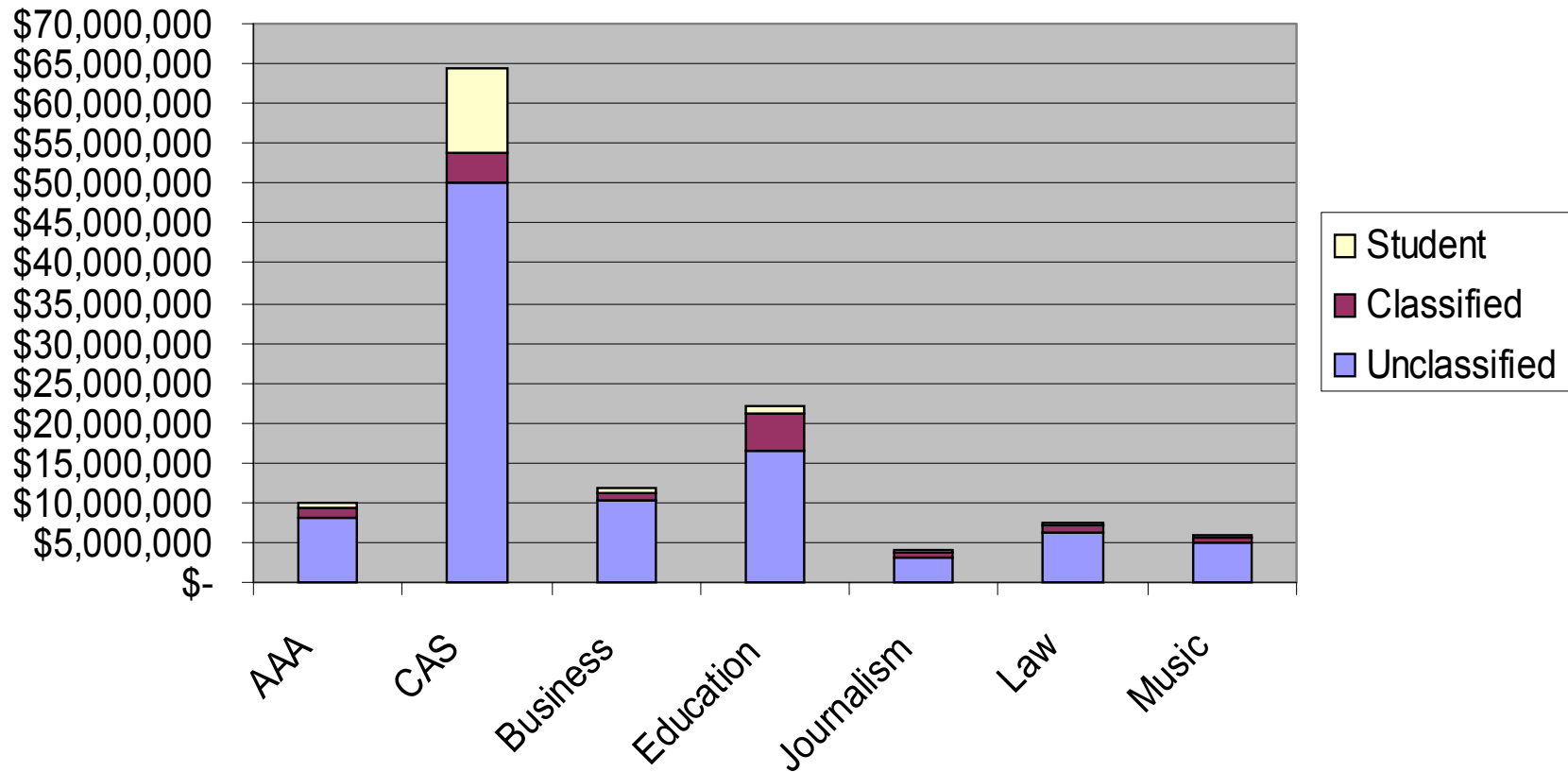
FIS Expenses

- Total labor expense \$268.6 million
 Payroll expense ranged from a low of \$17 million in August 04 to a high of \$24.9 million in November 04.
- Gross pay by fund type

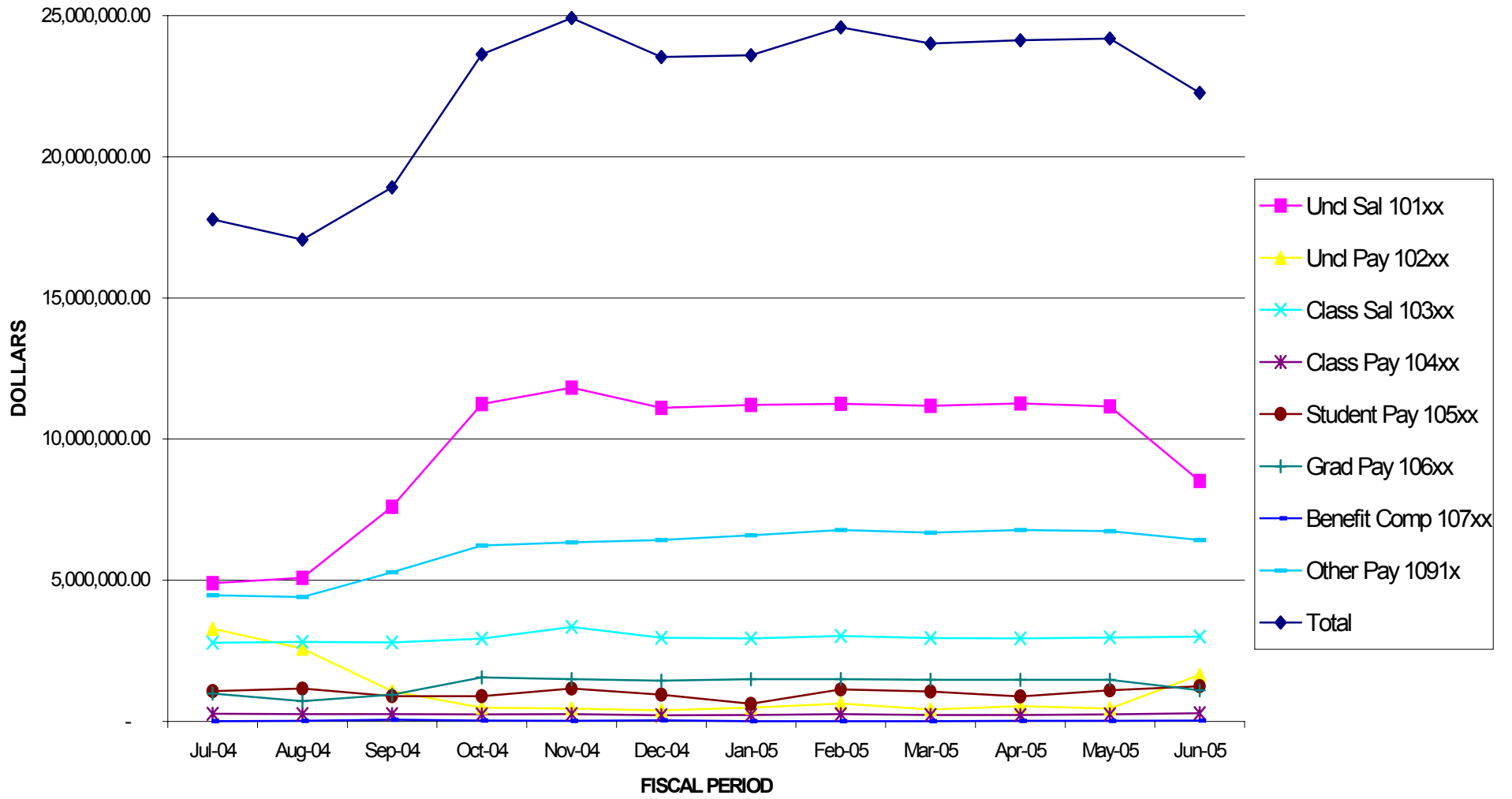
Budgeted Operations	62.7%
Federal Restricted	13.6%
Athletics	4.8%

All other sources contributed to less than 4% towards gross pay.

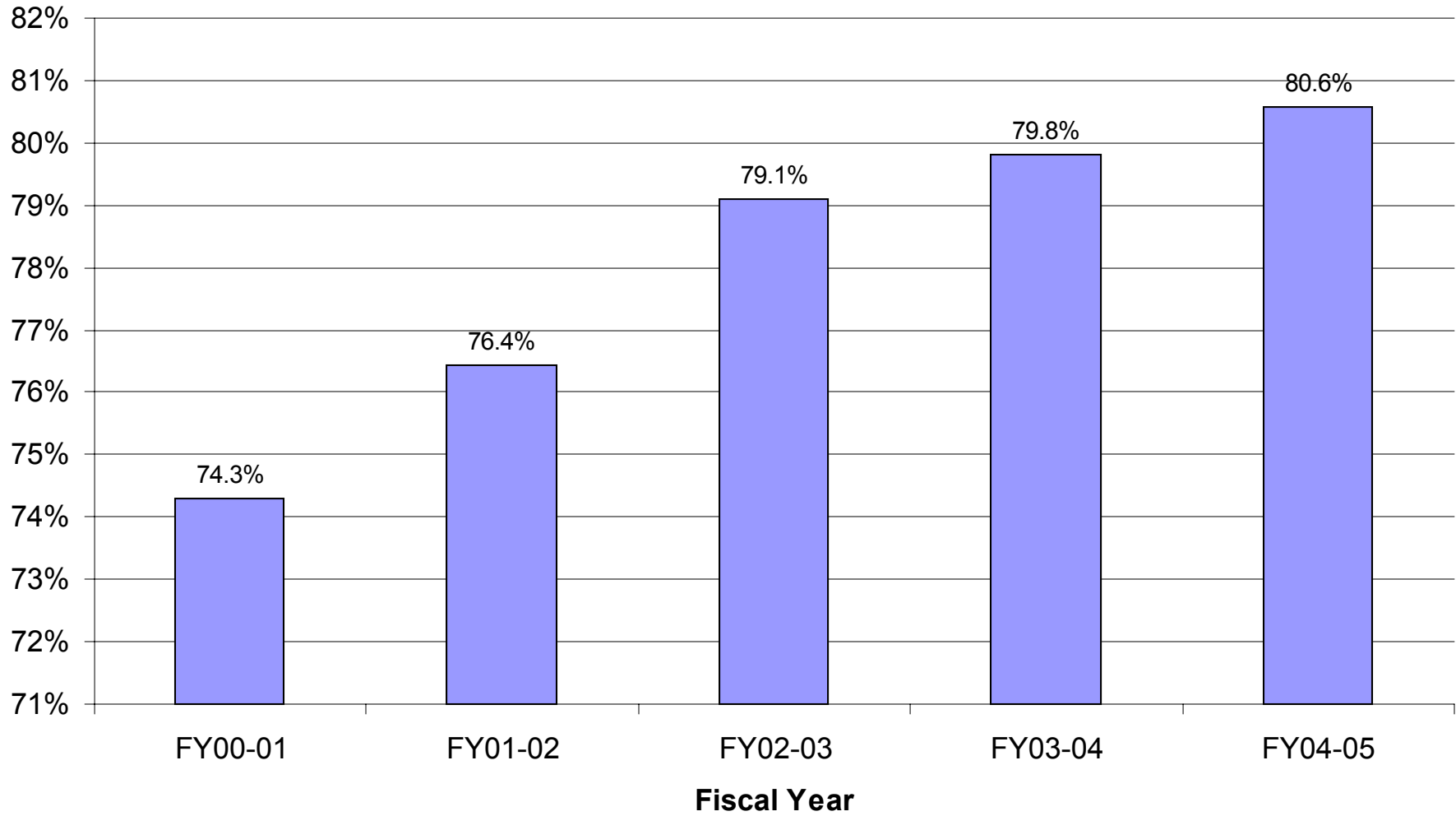
Fiscal Year Labor Expense by Academic Unit



PAY EXPENSE BY FISCAL PERIOD



Direct Deposit Participation



Purchasing and Contracting Services

Purchasing Achievements FY05

Continued review, analysis and discussion of recommendations for Oregon Administrative Rules revisions.

Professional Service Contracts.

- Realigned approval process and began review of PSC short form.
- PSC long and short form attachment revisions (photography.)
- Implemented web terms and conditions for PSC short form and removed resident alien restriction.

Piloted, tested and rolled out the Duckweb Purchase Order.

Evaluated new commodity code structure, obtained campus feedback, and concluded not to implement at this time.

Procurement and Team Travel Cards.

- Improved procurement card tracking and reporting by developing an Access Database.
- Refined procurement card review process including increased documentation review.
- Expanded use of team travel card to an additional department.

Streamlined the process for OfficeMax account set-up and maintenance.

Introduced and tested the new system for accessing DAS State Contracts – ORPIN.

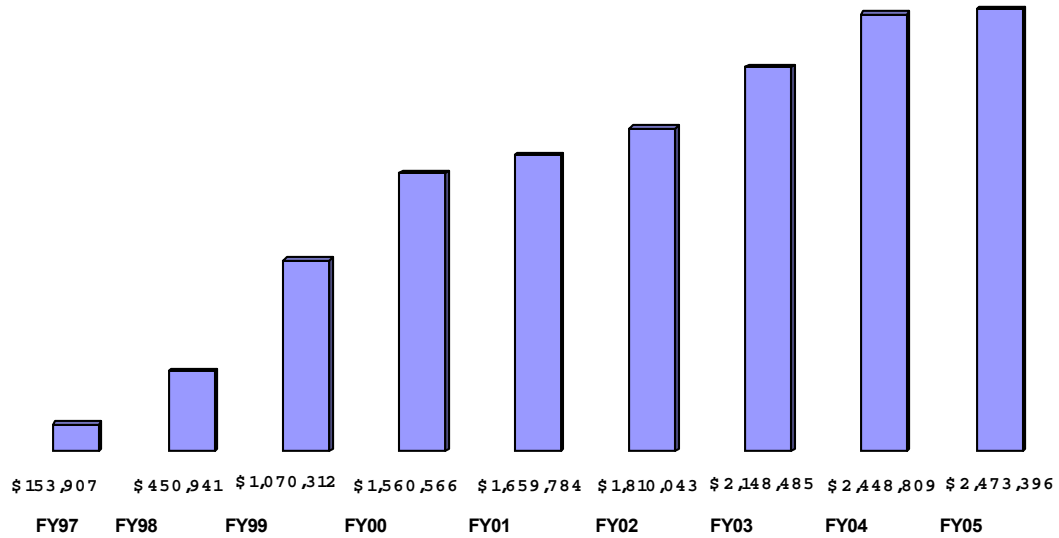
Purchasing Effort

• Invoice transactions approved	2,836
• Invoice dollars approved	\$85,370,977
• Purchase Order transactions approved	698
• Purchase Order dollars approved	\$15,058,105
• Procurement Card transactions	12,770
• Procurement Card dollars	\$2,473,396
• Department of Justice approval – Purchase Orders FY04 27 (14.8% decrease)	23

- Department of Justice approval – PSCs (long)
FY04 6 (66.7% decrease) 2
- Campus training sessions 40
- Campus training attendees 157
- Business and agency presentation attendees 145

Procurement Card

PROCUREMENT CARD PROGRAM GROWTH

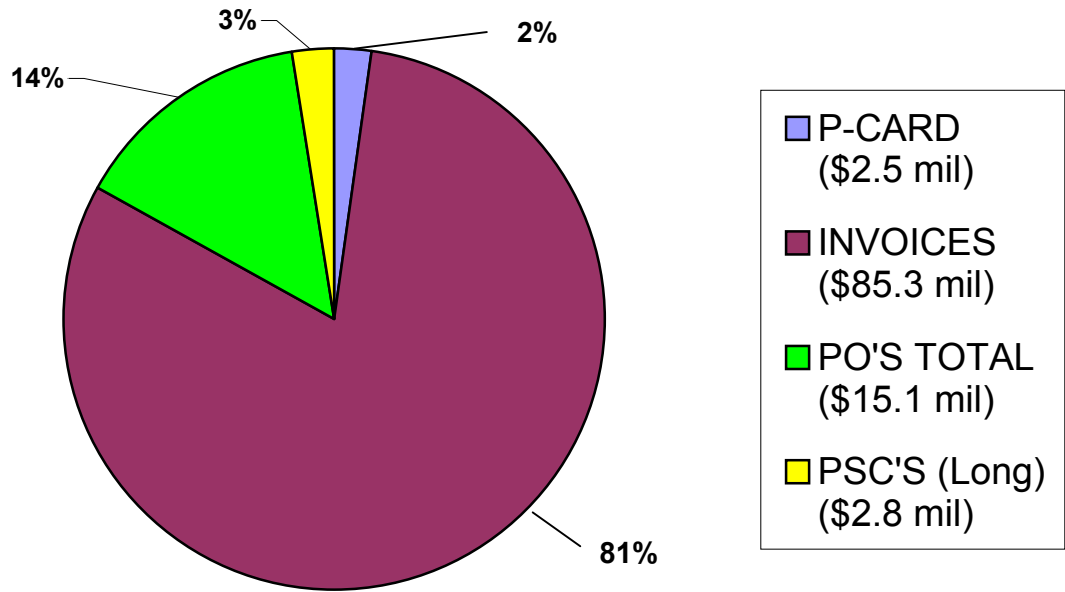


PROCUREMENT CARD COMPARISON OF SIGNIFICANT PROGRAM ELEMENTS

	<u>FY 01</u>	<u>FY 02</u>	<u>FY 03</u>	<u>FY 04</u>	<u>FY05</u>
TRANSACTIONS	10,836	10,793	11,863	12,556	2,770
VIOLATIONS	83	85	79	66	208
QUERIED TRANSACTIONS	648	882	1,312	2,132	2,095
TOTAL CARDS	207	205	209	220	219
TOTAL USERS	869	N/A	960	1,029	1,064
NUMBER OF TRAININGS	N/A	19	25	19	21

- Starting in December 2004 expanded email transaction queries to include a request for actual card user and implemented monthly documentation reviews.
- 60 of the 208 violations for FY05 were for unauthorized users.
- Opportunity for expanded education in the area of unauthorized users, expect future reductions in violations of this type.

Purchasing Dollars Reviewed PCS

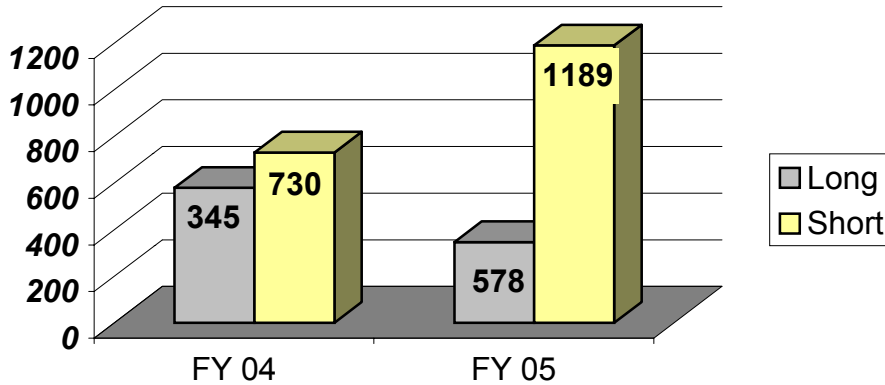


Total dollars reviewed \$105.7 million.

Paper Purchase Orders vs. FIS Purchase Orders

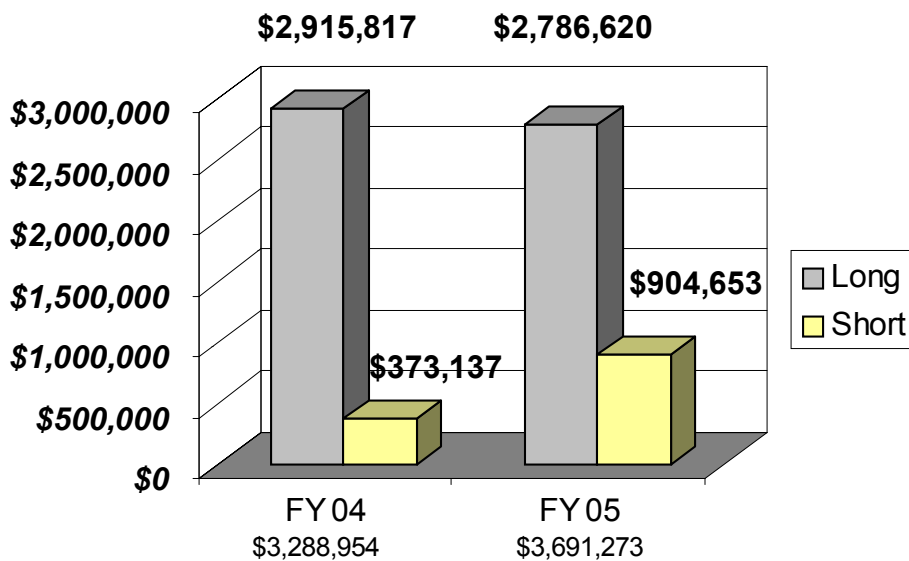
	FY 03		FY 04		FY 05	
Paper PO's	408	41%	317	40%	289	41%
FIS PO's	<u>599</u>	59%	<u>483</u>	60%	<u>409</u>	59%
TOTAL PO's	1007		800		698	

Personal Services Contract (Long vs. Short)



- In April 2004 the limit of the short form PSCs was raised from \$1,000 to \$5,000.
- For FY05, the number of long forms decreased by 68%, while the number of short forms increased by 63%.
- Total number of PSCs increased 64% from 1,075 to 1,767.

Personal Services Contract (Long vs. Short)



- Total dollars for PSCs increased by \$402,319 or 12%.

Purchasing and Contracting Services

Contracting Achievements FY05

Contracts processed – FY05 1,187
FY04 1,082 (10% increase)

Includes:

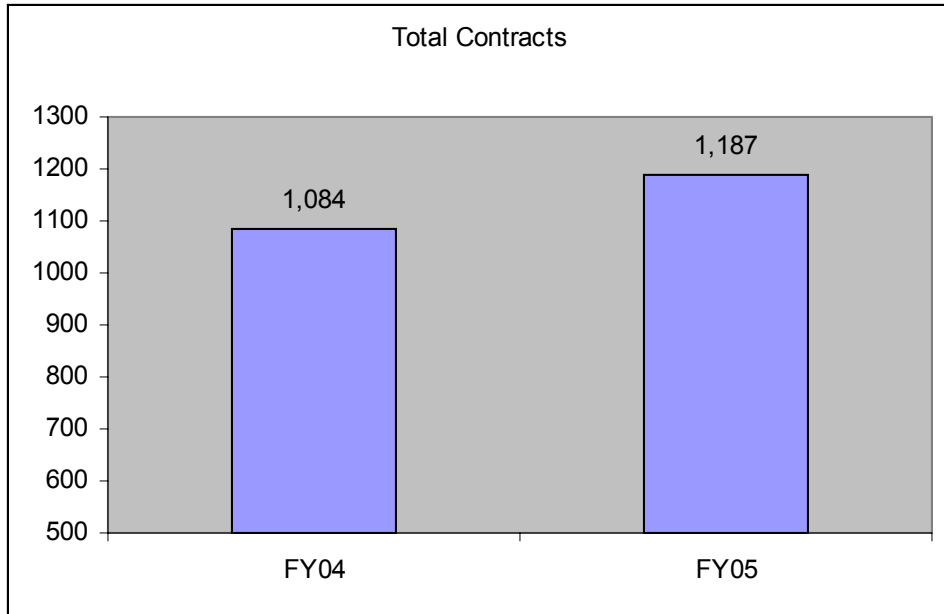
- “Custom” contracts - those drafted to reflect the particular details of a transaction.
- Template contracts - those drafted using routinely used template documents.
- Review of outside parties’ contract forms.

Department of Justice Contracts Approved – FY05 74
FY04 45 (64% increase)

Department of Justice Contract Dollars Approved – FY05 \$21,382,134

Major Contracts

- Ebill/epay contract.
- Document imaging and associated hardware purchases.
- Several large and complex scientific instrumentation purchases for Chemistry, CAMCOR, and Physics.
- Solicitations for student health insurance in tandem with Oregon State University.



FY05 Contract Totals/ DOJ Reviewed

