



ARKANSAS
TECH
UNIVERSITY

New Employee Orientation Procurement and Travel Services

Procurement and Travel Services

Staff Members

Jessica Holloway-Director
Jennifer Warren-Assistant Director

Procurement

DeAnna Kile-Procurement Manager

Cindy Hubbard-Buyer

Tammy Rye-Buyer

Kristi Higgs-Purchasing Specialist

Contact Information
479.968.0269
purchasing@atu.edu

Travel

Cindy Pratt-Travel Administrator

Dona Kirkpatrick-Travel Assistant

Contact Information
479.356.2034 or ext. 3503
travel@atu.edu

Procurement and Travel Services

Areas of Responsibility

Procurement

- Purchases made using operating funds and grants
 - Office of Advancement handles purchases using Foundation funds
 - Agency purchases are requested through the Accounting Office
- Process purchasing requisitions into purchase orders.
- P-Card program-training and auditing for compliance
- Contract management
- Construction procurement/projects-releasing IFB and issuing purchase orders
- Post Office
- Property and other insurance coverages and facilitate claims requests
- Manage revenue generating contracts

Travel

- Process travel requisitions and reimbursement requests for operating and grant funds.
 - Employees, Student, International, and Applicant
- Manage T-Card Program
- Audit TR-1's (form used to request travel reimbursements) for compliance.
- Process and audit Official Function reimbursement requests for compliance.

Ethics

ATU is an institution of the State of Arkansas.

As public employees our employment is a public trust and must be executed in such a manner to foster public confidence.

- Any attempt to realize personal gain through public employment by conduct inconsistent with the proper discharge of the employee's duties is a breach of public trust. –Ark. Code Ann. § 19-11-704(a)
- Personal gain include financial gains by any member of an employee's family.
- All funds received under the University umbrella should be reported directly to the Controller's Office immediately.
 - New grant funds, student organization dues, rebates, or refunds. All checks must be made out to Arkansas Tech and not to an individual.

Ethics Breech

- A vendor providing an ATU employee anything of value at no cost or substantially below market value even if that vendor is not currently participating in a solicitation.

Examples include

- Meals, equipment, clothing, vehicles, and event tickets.
- Any attempt to circumvent the bidding process.

Please note: Product samples or sponsored meetings (i.e. conferences or trade shows) are permissible but most not allow for individual gain.

If you aren't comfortable with it being in the headlines, don't do it!

Former Vassar College worker, wife sentenced for \$2.5 million theft

Updated Jan 20, 2012; Posted Jan 20, 2012

Former employee pleads guilty to embezzling \$300,000 from University of Montana

By GWEN FLORID of the Missoulian Aug 10, 2011

Procurement Process

1. Department realizes a need.
2. Research is done to determine how to meet the need. Procurement is a great source of information. Please reach out to us!
3. Department enters requisition to reserve funds for purchase.
4. Procurement submits requisition for approval if necessary.
5. Procurement assists in making sure that the good or service is procured within State of Arkansas and ATU guidelines. This may include issuing an Invitation for Bid or Request for Proposal.
6. If any software is purchased, fill out the OIS Software Application for approval first.
7. If any contract or agreement is required for purchase, fill out the cover sheet and it must go through our office first.
8. Procurement converts requisition to a purchase order and submits to vendor. Requestor receives departmental copy of PO in email inbox.
9. Good is received or service is performed.
10. Department signs departmental purchase order and forwards to Accounts Payable.
11. Payment is issued to vendor.

P-card & Requisition Approval Process

	Division	Approval Limit
Dr. Phillip Bridgmon, V.P.	Academic Affairs	≥\$5,000
Bernadette Hinkle, V.P.	Administration and Finance	≥\$5,000
Dr. Blake Bedsole, V.P.	Enrollment Management	≥\$5,000
Mike Hutchison, V.P.	Advancement	≥\$1,000
Coach Steve Mullins	Athletics	≥\$1,000
Laury Fiorello	Ozark	≥\$1,000
Dr. Keegan Nichols, V.P.	Student Services	≥\$1,000
Dr. Robin Bowen, President		≥\$50,000

- Requisitions that exceed these limits are subject to approval.
- Procurement will obtain the approvals after the requisition is printed in our office. **Note: Approval from Dean may be obtained by requestor and forwarded via email to academicaffairs@atu.edu when requisition is entered.**
- You will know the approval has been received when you receive a PO in your inbox.
- Grants go to Budget Office for approval.

Bid Limits

Effective July 31, 2017

Act 1004

- <\$20,000 may be purchased without an Invitation for Bid.
- \$20,000.01-\$75,000 must have an informal Invitation for Bid issued.
 - 1-2 week lead time.
- \$75,000.01 and up must have formal sealed Invitation for Bid issued.
 - 3-4 week lead time.
 - Request for Proposal may be used.
- All printing must be bid through our office regardless of \$ amount.

State Contracts

Mandatory Contracts

- Goddess/Office Depot-Office Supplies
- Staples Advantage-Office Supplies (min \$50 for online ordering)
- ASU Printing-Letterhead & Two Color Envelopes
- Printing Papers-Paper (min \$500) & Black/White Envelopes
- Target Printing-Business Cards

Optional Contracts for Non-Mandatory Items

- Amazon Business-Except office supplies
- E & I
 - B&H Photo
 - CDW-G
 - Claridge
 - Connection



Procurement Card (P-Card)

- P-Card is a state-sponsored Visa credit card utilized for small dollar amount purchases.
- Requires agreement be signed by employee, Dean, and V.P. and employee is solely responsible for compliance when using the card.
- Card is reconciled by the cardholder once monthly by submitting a P-Card log and original receipts.
- Training is offered after agreement has been submitted to Procurement Services.



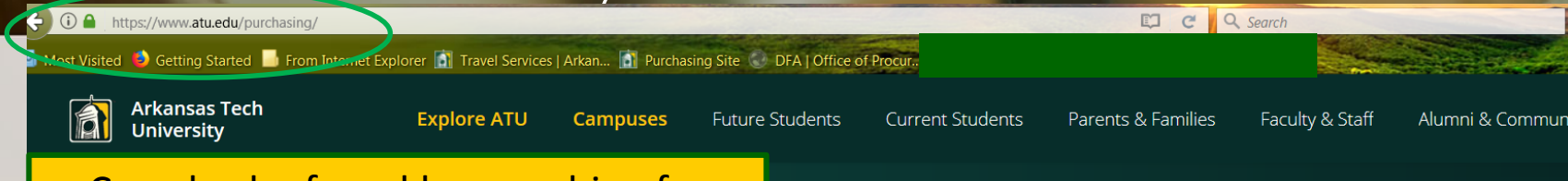
Promotional Items & Giveaways

Approval is a must from the Controller if given to Faculty, Staff and Students.

- Anything w/Tech logo (must be approved through MARCOMM)
- Awards
- Plaques
- Promotional Items
- T-shirts (must be approved through MARCOMM & bid) and Don't Forget to Enter a Requisition 😊

Approval form must be turned in with P-Card log or requisition

Faculty & Staff Resources



Can also be found by searching for *Purchasing* on the ATU homepage.

PROCUREMENT & RISK MANAGEMENT SERVICES

FACULTY & STAFF RESOURCES

GENERAL FORMS

- How do I order (offer) online from GoCodes?
- GoCodes Products User Request Form
- GoCodes portal/login password info
- Basics Advantage Registration
- Basics Advantage Returns/Missing Items
- Need to enter a requisition, but the vendor doesn't have a T-number. What do I do?
- Request for New Vendor
- Request for New Campus Address
- Arkansas Claims Commission
- Camp Insurance Claim Form
- Inventory Notification Form for P-Card Log

BUSINESS CARDS & STATIONERY

- How do I order business cards?
- Target Ordering Business Card Prices
- Letterhead and Business Pricing
- Business Card Request Form
- Stationery Request Form
- Robohead Training Presentation

FURNITURE

- Furniture Standards
- How do I order furniture for my department?

TRAINING

- Procurement Training Videos
 - o One Team Login Required
- Procurement Policies and Procedures
- Fall 2017 Training Presentation

P-CARD INFORMATION

- How do I apply for a P-Card?
- US Bank Access Online
- Dispute Form
- Employee Agreement Manual
- Training Site Presentation
- Missing Receipt
- Order Request Form
- Online Registration
- Pocket Guide
- Transaction Log Instructions
- Transaction Log

MANUALS & GUIDELINES

- Account Code Listing
- Adobe Product Ordering Instructions
- Apple Device Purchasing Procedures
- Approval Limits for Procurement Requisitions and P-Card Transactions
- Banner Requisition Manual
- Procurement Guidelines
- University Learning
 - Procurement
 - Procurement
- Procurement Contract Information
- Procurement Evaluation
- Procurement Procedures
- Procurement Codes
- Procurement Software Best Practices

VOICEMAIL

- Manage Voicemail Online
- Voice Mail User Guides
- Voice Mail Instructions

CONTRACTS AND AGREEMENTS

- Contract and Agreement Evaluation Process
- University Council Contract Cover Sheet
- Hardware/Software Best Practices

Procurement Services is a unit established to support the educational and research missions of Arkansas Tech University. It is staffed by procurement professionals who have the requisite knowledge, skills and training to assist University faculty and staff in the procurement of goods and services. This expertise insures that procurement decisions will be made in the best interest of the University and in compliance with the State of Arkansas procurement law and University policies.



Menu

FACULTY & STAFF RESOURCES

Account Code Listing
Adobe Product Ordering Instructions
Banner Manual

Furniture Standards

- Standards are in 4 areas
 - Classroom
 - Lounge
 - Office
 - Task Seating
- 3 price categories
 - Group A-Value, Group B-Mid, Group C-High End
- Benefits
 - Aid in selecting furniture, reusing pieces across campuses, and establishing a more standardized look across buildings.
- Please **do not** use P-card for furniture purchases
- Any questions, contact Jennifer Warren, jwarren2@atu.edu

Which one will I use?

Price category used will primarily be determined by amount of funds available, where the furniture will be placed, and how it will be used.

Contracts & Agreements

Requestor completes requisition, contract cover sheet, and submits hardware/software application (if applicable).



Requestor forwards contract along with completed and signed coversheet to purchasing@atu.edu.



Procurement Services reviews requisition and contract to determine if bid is required. If so, then requestor is contacted for additional information.



When all procurement requirements have been met and OIS evaluation (if applicable) has been received Procurement Services will forward contract to the University Counsel for review.



After reviewed contract is signed by both the vendor and the University, a purchase order is issued and sent to the vendor.

- Enter “Contract to follow” on requisition
- Cover sheet must be signed by the requestor and VP and is available at Procurement website.
- Send all contracts to Tammy Rye at purchasing@atu.edu

Contract Cover Sheet


- Please complete entire document
- Requestor and VP signatures are required
- Missing information will impede the process

Contract Approval Cover Sheet Office of University Counsel, Administration Building Room 212	
<i>Complete and attach this cover sheet to all contracts, agreements, and memorandums of understanding (MOU) prior to submission. Contracts should be submitted no less than 14 days prior to the date needed. If purchasing goods or services this contract MUST be reviewed by Procurement. If purchasing goods or services: Email this cover sheet along with your contract to purchasing@atu.edu. If NOT purchasing goods or services: Email this cover sheet along with your contract to wcondry@atu.edu.</i>	
Submitted By: _____	Date Submitted: _____
Department: _____	Date you received contract: _____
Phone #: _____	
1. For purchase of goods or services, please provide the requisition # or notate the source of the funds: Requisition# _____ or Other (Agency or Foundation) _____	
2. Type of Agreement: <input type="checkbox"/> New Agreement. <input type="checkbox"/> Modification of Existing Agreement <input type="checkbox"/> Renewal of existing agreement	
3. Vendor Name: _____	
4. Contract Terms: \$ _____ Start Date: _____ End Date: _____	
5. Briefly explain the purpose of the contract/agreement. _____	
6. Will this contract require the Vendor to possess data about students or employees? If yes, please explain. _____	
7. If submitted less than 14 days prior to date needed, explain nature of emergency. _____	
General Information	
<ul style="list-style-type: none">• Any purchase over \$20,000 must be bid.• Arkansas Tech University will not agree:<ol style="list-style-type: none">1. That the contract is to be governed by the laws of any state other than the State of Arkansas2. To indemnify the other party to the contract.3. To jurisdiction in a state other than the State of Arkansas.• This contract will be reviewed with the assumption that all bidding, publication and notice procedures required under Arkansas law have been followed. If these procedures have not been followed, you should not pursue this contract until full compliance with all Arkansas procurement laws have been achieved. In addition, no opinion is rendered regarding the economic feasibility of the terms of the contract or the advisability of the venture as a whole.• It is the responsibility of the department to contact the vendor regarding any necessary revisions.• Any revised language or additional changes the vendor makes to the contract/agreement must be resubmitted to the Office of University Counsel for review.• ALL contract must be signed by the President or Vice President for Administration and Finance or the President or Vice President for Administration and Finance's designee.	
I confirm that the contract/agreement is complete and includes all exhibits, attachments, and pages.	
Signature: _____	Date: _____
Contract Approved by Vice President: _____	Date: _____

Travel Process

- Various types of travel
 - Employee without student
 - Employee with students-athletics and conferences
 - Agency travel-Registered Student Organizations
 - International travel-employee and student
 - Non employee and applicant
- Rules and regulations differ for these situations
 - Example: Special permission can be given by DFA for student meals to be placed on the TCard, but meals are strictly a reimbursable for employee travel.
- Requisitions are required for all travel expenses and must be entered prior to travel dates.

Travel Online Resources

←  <https://www.atu.edu/travel/>

80%

Search

Most Visited Getting Started From Internet Explorer Travel Services | Arkan... Purchasing Site DFA | Office of Procur...



Arkansas Tech University

Explore ATU

Campuses

Future Students

Current Students

Parents & Families

Faculty & Staff

ABOUT US

- Employee Travel
- Student Travel
- International Travel
- Official Function
- Non-State Employee & Applicant Travel
- T Cards
- Employee Moving
- Training
- FAQ
- Contact Us
- Employee Moving Reimbursement

TRAVEL SERVICES

WHO WE ARE

Welcome to Travel Services for Arkansas Tech University. We offer information on travel policies and procedures and customer service to assist the university community in navigating the travel planning and reimbursement process. This includes business, educational, athletic, and international travel. Our goal is to assist faculty, staff, and students as we support the Tech mission of providing opportunities for progressive intellectual development and civic engagement. We offer training opportunities both online and in-person and audit travel documents.

ANNOUNCEMENTS

Beginning April 1, 2018 an agenda for your conference/meeting is to be included with any airfare booking to meet audit requirements.

An approval signature is now required on the Departmental Copy of your Travel Purchase Order. Please ask your supervisor to sign this PO and submit it with your reimbursement request to Travel Services.

A Domestic GSA Per Diem Chart is now available and if your destination is included in this chart, a print out from the GSA website for your destination's meal and lodging allowances is no longer necessary.

**CURRENT
PROCUREMENT
AND TRAVEL
SERVICES
NEWSLETTER**

**DFA OFFICE OF
ACCOUNTING
NEWSLETTER**

**FORMS AND
RESOURCES**

[Travel Reimbursement Form-TR1
\(Excel\)](#)

[TR1 \(Adobe\)](#)

[TR1 Instructions](#)

[Travel Policy 2017](#)

[Travel Policy Quick Facts](#)

[Travel Policy Presentation](#)

[Motor Pool Policy](#)

[Employee Moving](#)

[Day Travel-Without-Overnight Stay
Form](#)

[GSA Meal Reimbursement Policy](#)



Menu

Training and Resources

Procurement training is available online via videos and in person upon request.

Travel training is available in person, please contact Travel Services to schedule.

<https://www.atu.edu/purchasing/>

- Announcements
- Forms and guidelines
- Training manuals
- Step-by-step requisition entry videos
- And much more!

<https://www.atu.edu/travel/>

Thank you for coming!

