
Franklin Business Services Center (BSC) Purchasing Tips & Tricks

Introduction

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When purchasing at UGA, the method of preference is

Purchase Order > Payment Request > P-Card > Personal Reimbursement > Petty Cash

The Business Services Center (BSC) is here to help you determine the best purchasing method given the type of good/service you wish to obtain, the price point, and if the order/service has already been completed. BSC has prepared the following purchasing guide to take you through the options for purchasing at UGA, which are subject to policies from the Accounts Payable and Procurement offices as well as the State of Georgia. BSC division team emails are available here.

Additional Guides are available for Non-Employee Visitor and Services, Food & Entertainment, and Travel on FBSO's [Forms and Resources Page](#).

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1. General Information

Signing Contracts, Agreements, etc.: Neither FBSO nor department faculty, staff, and students have signature authority on behalf of UGA. Do NOT sign any documents provided to you by a vendor. These will be reviewed and signed via UGA Legal Affairs and UGA Procurement once terms and conditions are agreed upon.

Paying Taxes: Purchases made directly through UGA purchasing methods are tax exempt; please make sure quotes and invoices have tax removed if paying through a UGA account. If an expense is being paid directly through the UGA Foundation, it WILL pay tax.

Pricing Over \$2,499.99: If a goods or services order will total over \$2,499.99, you MUST use the purchase order method outlined below except for those allowed regardless of dollar value via payment request listed [here](#). This includes if the cost for a single service/project will be divided over multiple invoices, if the total of all invoices will exceed \$2499.99.

Unauthorized Purchases: If a purchase is made using the wrong purchasing mechanism, the purchaser will be required to submit an explanation of why proper purchasing policy and procedure were not followed along with an assurance that steps will be taken to avoid future violations. The explanation should include a description of the unauthorized purchase, why the unauthorized purchase occurred, and a description of preventive steps. If an unauthorized charge purchase is submitted for payment or reimbursement, it will be reviewed by an appropriate level of University Management and a case-basis determination will be made as to its approval.

Click [here](#) if the unauthorized purchase is for services \$2,500 or greater (will require sole proprietor or e-verify documents).

IT Purchases: To streamline purchasing, submit a [ticket](#) to OIT for any item meeting Franklin's inventory [policy](#) (laptops, tablets, computers, etc.), items over \$3,000, and purchases needing [CESS review](#) (including software and subscriptions). Franklin OIT will submit the order to BSC to verify funding and submit for approvals once reviewed. Software/subscriptions MUST be tied to a UGA email address in order to be paid/reimbursed by UGA.

Memberships and Dues: Memberships and dues to professional societies can only be paid in the name of an individual if one of the three allowable circumstances in the [membership policy](#) is met; justification will be required.

Consultants: "Consultant" is defined by [UGA policy](#) as a person or company who gives specialized or expert advice. "Consulting" is non-professional services which involve the rendering of advice only.

Click [here](#) for more information on setting up payments to consultants.

Research Incentives: Reach out to BSC early to discuss the best payment method for your particular research incentive situation. Policy information from the Human Subjects Office can be found [here](#) and compensation policy information [here](#). UGA highly encourages the use of [ClinCard](#), a reusable prepaid Visa card or virtual card.

Receipts/Invoices: Receipts and invoices should be translated into English if they are in a foreign language. They should also include the name of the vendor, date of service, itemized description of the goods/services, and amount for each line item. A receipt should also include proof of processing (final 4 digits of card charged, \$0 remaining balance, etc.).

Wire Transfers: UGA can process wire transfers to international vendors. The information needed to initiate a wire transfer is listed in UGA's policy [here](#).

2. Purchase Orders (POs):

Purchase orders can be placed for any good or service as long as the vendor accepts purchase orders and are completed through UGAmart: <https://ugamart.uga.edu/>

POs are the safest and most highly recommended way to purchase goods and services at UGA. POs can **only** be placed if the product has not been received or services have not been completed yet.

Assigned Roles and Process:

The **shopper** role is automatically given to all UGA Employees, which allows the shopper to put together carts before assigning them to a requisitioner to finalize the cart and add account information.

The **requisitioner** role is filled by the Business Services Center (BSC) partner assigned to your department. Please see instructions [here](#) on adding a default BSC assignee and shipping location to your UGAMart profile.

When assigning a cart to BSC, use the comments section to note the shipping address and funding source (preferably the chart string/speedtype). If the order is for a hazardous chemical, provide the Chematix storage location.

Orders will be shipped through UGA Central Receiving except for services and large equipment. Please let BSC know via the comments tab when services are completed or items received in these cases, in order for a receipt to be created and invoices paid.

Click here for more information on putting together and assigning carts.

Click here for more information on purchases \$25,000+ in price.

Click here for more information on blanket purchase orders.

Click here for more information on orders where the vendor requires advance payment.

Click here for more information on orders involving services totaling over \$2,500.

Click here for more information on mandatory contracts on furniture.

After the requisition converts to a PO, the order will be sent to the vendor. It is the vendor's responsibility to send invoices to actpay@uga.edu. If you are sent a copy of the invoice, confirm with the vendor that they sent a copy to actpay@uga.edu as well per the instructions they received with the order.

3. Payment Requests:

Payment requests are paid directly to vendors without a purchase order being set up prior. Payment requests can only be paid once the goods have been received and/or services rendered.

In order to process a payment request, the vendor must be registered in UGA's vendor system. If you think a vendor may already be registered, you can email your BSC division to confirm.

Payments are limited to \$2,499.99 except for what is listed in the policy as regardless of dollar value [here](#).

Hazardous materials, trackable chemicals, firearms, vehicles for road use, and purchases that require regular interaction with the UGA population or regular access to campus are NOT allowed on payment request.

Services may be paid via payment request only if the total fiscal commitment for the overall project is under \$2,499.99.

- Ex: A one-time translation payment of \$200 can be paid via payment request.
- Ex: Transcription services in which each invoice is \$500 but the total project cost is \$5,000 can NOT be paid via payment request and must be set up as a purchase order with that vendor.

Vendor invoices, completed and signed [non-employee payment forms](#), or completed and signed [services performed outside the United States forms](#) (including for virtual services provided from outside the US) should be emailed to BSC for processing.

A Non-Employee Visitor & Services Guide is available on FBSO's Forms & Resources [page](#).

4. P-Card:

P-cards are visa purchasing cards held by university employees. P-cards may be used as the method of payment for unplanned, non-routine, or urgent purchases of supplies and materials, non-inventoried equipment (\$2499.99 and below) and non-contract services valued at \$2499.99 and below. Purchase amount includes shipping and/or handling charges.

BSC partners hold p-cards for the college; for p-card requests please email your BSC division for the internal request form and guidance. BSC partners have state approval to work with certain crowdsourcing vendors, can purchase from ebay using the buy now option only, and cannot purchase from mercari or etsy. Individuals in departments needing their own p-cards for study abroad programs or research purchases should reach out to BSC to begin the application process.

All p-card orders must include a short justification for purchases. The justification should specify how the purchase directly relates/benefits the account to which it is being charged. Keep in mind the purchases must be allowable per the terms and conditions of sponsored projects and the University's Direct Cost Policies and Procedures, if a grant is the funding source. Orders without justification will not be processed. Always include the funding source (chart string/speedtype) when emailing your p-card request to BSC.

Click here for more information on who can hold a p-card.

5. Personal Reimbursement:

Occasionally an employee may need to pay a vendor using their personal funds. Travel and business entertainment are commonly handled via personal reimbursement and guides on those topics can be found [here](#). Purchases made via personal reimbursement become the property of the University of Georgia once the employee has been reimbursed.

If items or services can be acquired through standard purchasing methods, such as Purchase Order, Payment Request, or p-Card, personal reimbursement should be considered only as a last resort.

Please contact BSC to discuss purchasing options before spending out of pocket. If you do have to spend out of pocket, send BSC a justification with your itemized receipts explaining why you could not use a standard purchasing method. In certain cases, software or subscriptions may need to be paid via personal reimbursement; click here for more information on having Franklin OIT review your situation BEFORE purchasing. BSC cannot guarantee that reimbursement will be approved if not consulted beforehand.

Personal reimbursement may only be made for purchases not exceeding \$2499.99 (splitting purchases to get around the limit is not allowed); prohibited purchases are listed [here](#).

Receipts, justifications, funding source, etc. should be emailed to BSC for review and processing via expense report. [Add](#) BSC Partners as delegates if you have not already.

6. Petty Cash:

Petty cash is only used as a payment mechanism when immediate payment is required from a vendor and the formal billing and purchasing processes for the University cannot be used, such as for StudyAway programs or international fieldwork situations.

Please email BSC immediately if interested in a Petty Cash account.

Click here for more information on who can be a custodian of a petty cash account.

Additional Information

a) Vendor Registration:

Vendors (whether individuals or companies) must register and be in UGA's financial system in order to execute the Purchase Order or Payment Request payment options. Vendors who have received payment from UGA before do not need to re-register.

- **US CITIZEN/PERMANENT RESIDENT INDIVIDUALS**
 - Send them this link: <https://suppliers.uga.edu>
 - The individual must say "YES" to accepting purchase orders while registering in order to appear in UGAMart.
 - Immediately upon submission, the individual should receive an automated email confirmation with a registration number.
 - Step-by-step instructions with screenshots can be found here:
<https://uga.teamdynamix.com/TDClient/3109/FandA/KB/ArticleDet?ID=149300>
 - Once approved (in 2-3 business days), the individual will receive another email with their supplier number.
- **US COMPANY**
 - Send them this link: <https://suppliers.uga.edu>
 - The company must say "YES" to accepting purchase orders while registering in order to appear in UGAMart.
 - Immediately upon submission, the individual should receive an automated email confirmation with a registration number.
 - Step-by-step instructions with screenshots can be found here:
<https://uga.teamdynamix.com/TDClient/3109/FandA/KB/ArticleDet?ID=149151>
 - Once approved (in 2-3 business days), the individual will receive another email with their supplier number.
- **NON-US CITIZEN/PERMANENT RESIDENT INDIVIDUALS**
 - Individuals should send a completed [W-8BEN form](#) to the OneSource Service Desk at onesource@uga.edu to complete the supplier registration process.
 - If the individual needs to appear in UGAMart in order to place orders, they must also submit the [Vendor Profile Form](#) to onesource@uga.edu
 - Once approved, a supplier number will be provided.
- **INTERNATIONAL COMPANY**
 - The company should send a completed [W-8BEN-E form](#) to the OneSource Service Desk at onesource@uga.edu to complete the supplier registration process.
 - If the company needs to appear in UGAMart in order to place orders, they must also submit the [Vendor Profile Form](#) to onesource@uga.edu
 - Once approved, a supplier number will be provided.

b) Putting Together UGAMart Carts:

Here are resources to get started:

- [UGAMart Overview/Quick Start](#)
 - Make sure to submit carts only 1 vendor at a time; if multiple vendors are added to 1 cart, the order will have to be redone
- [Shopping for Punchout Catalog Items](#)
 - Fisher Scientific, VWR, Bio Rad, IDT, Airgas, and Sigma-Aldrich are all available under the newly launched LabViva Punchout tile on the home screen
- [Shopping for Hosted Catalog Items](#)
- [Shopping for Non-Catalog Items](#)

- Make sure to include a quote from the vendor or other documentation of the pricing you've entered on the cart
- [Shopping Checkout](#) (first 4 minutes only for shopper role)
 - In the comment box please list:
 - The funding source (ideally chart string or speedtype)
 - The address the order should be delivered to
 - If the order is hazardous, please note the Chematix location

c) \$25,000+ Orders:

Orders \$25k-\$249,999.99 will require 2-3 informal quotes, [sole source](#) justification, or [sole brand](#) justification with the sole source/sole brand [form](#) completed. Please Note: If the goods/services being purchased are not exempt from the state competitive bidding requirements, it may be necessary to obtain formal competition through Procurement for purchases of \$25k or greater.

d) Blanket Purchase Orders:

Blanket POs are set up with individual vendors for a specific dollar amount and period of time. They are frequently used for sequencing and analysis. The individual/lab should contact the vendor for a quote and follow normal purchasing procedures from there. If the blanket PO is being charged to sponsored project funds, the individual/lab should ensure the quote does not exceed the end date of the sponsored project. Blanket POs can not extend past June 30 as that is the end of UGA's fiscal year. New blanket POs must be set up in each fiscal year.

Once the blanket PO is established the individual/lab will contact the vendor directly to order items referencing the PO#.

Common vendors include Airgas, Azenta, Eurofins Genomics, Plasmidsaurus, and Eton Bioscience.

e) Payments to Accompany Order/Advanced Payments:

Purchase order invoices are not normally paid until the order has been received/services fulfilled. If a vendor requires advance payment, this can introduce risks to the university.

If advanced payment is required under the terms of the purchase, the UGA mart requisition must be accompanied by either an invoice, an order form from the vendor, or other price supporting documentation. When prepayment is required, the end user should indicate this requirement in the UGA mart internal notes area, and the resulting purchase order will include the pre-payment instruction.

Depending on the nature of the procurement, UGA Procurement Office may contact the end user department to ensure they understand the business risks associated with the prepayment and ask for written confirmation that the department is willing to assume these risks. Additionally, if a restricted or sponsored account is involved, Sponsored Programs Post Award Accounting must approve the advance payment.

f) Mandatory Contracts on Furniture

UGA is under a mandatory contract on furniture requiring certain vendors be used; more information [here](#). Several Authorized Dealers are listed below that work with the manufacturers on the mandatory contract. Be sure to tell them what type of furniture you are looking for and your budget. If you need help in any way – please contact Kimberly Eldridge (Kimberly.eldridge@uga.edu).

1. McGarity's Business Products: <https://www.mcgaritys.com/contact/>
2. Chastain's Office Furniture: <https://www.chastains.com/contact-us/>

3. C-W-C: <https://www.c-w-c.com/get/athens-office-furniture>
4. Fowler Office Interiors: <https://folcoinc.com/wp/contact-us/>
5. Office Creations: <https://officecreations.net/contact/>

g) E-Verify and Sole Proprietor Form:

Services paid to an individual for projects costing over \$2,500 will need a letter from central HR giving approval to pay the person as an independent contractor vs. an employee. FBSO staff will work with you on collecting information needed for this approval.

Services over \$2,500 should be processed on a Purchase Order.

UGA must obtain a signed and notarized E-verify Contractor Affidavit or Sole Proprietor Form (more information below) prior to any UGA contract or transaction for services over \$2,500.00.

For purchase orders, UGA procurement staff will reach out to the vendor to obtain the affidavit or form once a requisition is received and prior to issuing a Purchase Order. However, department users can help expedite this process by obtaining a signed and notarized affidavit or form from the contractor and attaching it to the draft requisition. If the department obtains the affidavit or form after the requisition is submitted, it can be attached entering a UGAmart comment on the requisition.

For services over \$2,500 that should have been set up on a purchase order but are being processed via payment request (with the unauthorized purchase letter attached), the department will need to request the following from the vendor:

- [E-Verify Affidavit](#) (if business has 10+ employees or holds a qualifying public contract), or
- A [sole proprietor form](#) and a copy of the vendor's state-issued driver's license or identification card that is compliant with the Real ID Act for services provided by individuals with no employees and no intent to hire employees

h) Who Can Hold a P-card:

A PCard may be issued only to permanent, part-time or full-time, employees of the University whose job duties require the use of a PCard. Cards are issued to individual employees only rather than to a specific department or division.

Pcards are highly regulated and monitored and department employees should only request a pcard for high need situations.

Criminal and Credit Background checks must be conducted before a pCard can be requested. The employee must be seated in a "position of trust." Existing employees who either transfer departments or are promoted to a "position of trust" must undergo both a criminal background and credit check as required by State policy.

Only the person named on the Pcard is the authorized user. Pcard sharing is prohibited and will result in immediate termination of the Pcard and all Pcard privileges.

More information from UGA procurement on the p-card program is available [here](#).

Email BSC to discuss holding a p-card and requesting application materials.

i) Petty Cash Custodians:

The custodian must be a full-time employee of the University of Georgia. The custodian must accept personal responsibility for the safety, proper usage, and return of the funds entrusted. In certain circumstances, the actual handling of the funds may be delegated to another UGA employee, but the responsibility of the funds remains with the custodian (this delegation is subject to review and approval by the Bursar and Treasury Services). Anyone handling petty cash and/or change funds is in a "position of trust" and must follow applicable Human Resource policy.

A BSC partner will serve as reconciler of the petty cash account.

j) Consulting Services:

1. Email your BSC division to request the consulting services assessment questionnaire.
2. If approved as an independent contractor, the consultant and department will need to complete UGA's [consulting agreement](#) or provide a service proposal the consultant has signed.
 - a. Central HR will provide an approval letter
 - b. Reminder: Do NOT sign on behalf of UGA; Procurement will review and sign for UGA.
3. The consultant must register as a supplier with UGA; if the total cost will be over \$2,500, they MUST say "yes" to accepting purchase orders when registering.
4. If the consultant/firm employs more than 10 full-time employees, they must provide an E-Verify.
 - a. If they do not, obtain a notarized sole proprietorship affidavit with a copy of the consultant's driver's license or passport.

If the total cost is under \$2,500:

- A. Consultant registers as a supplier with UGA and DOES accept purchase orders:
 - a. A non-catalog item UGA mart cart will be processed with the items listed in 2 and 4 attached
- B. Consultant registers as a supplier with UGA and does NOT accept purchase orders:
 - a. BSC will send the consulting agreement or service proposal to procurement for review and final signatures.
 - b. BSC will create a Payment Request with a non-employee payment form and the items listed in 2 and 4 attached.

If the total cost is between \$2,500 and \$25,000:

- A. Consultant registers as a supplier with UGA and MUST accept purchase orders.
 - a. A non-catalog item UGA mart cart will be processed with the items listed in 2 and 4 attached

If the total cost is over \$25,000:

- A. Consultant registers as a supplier with UGA and MUST accept purchase orders.
- B. Bid specifications or a sole source justification explaining the lack of competition must be provided at this price point
- C. A non-catalog item UGA mart cart will be processed with the items listed in 2 and 4 attached, along with the bid specifications or sole source form