



Overview of Procurement & Business Services

Department of Procurement and Business Services

Procurement Month 2024 Training

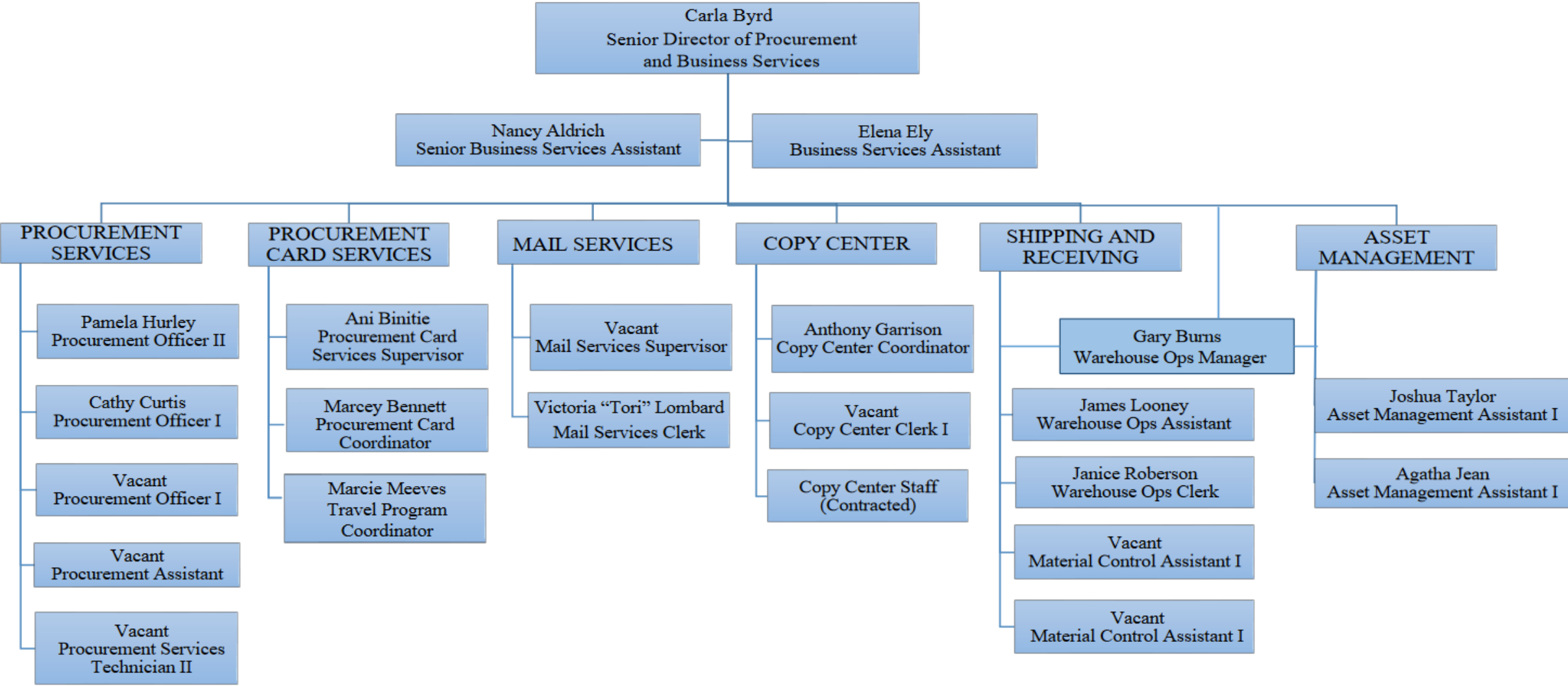
March 18, 2024

2024 March Procurement Month Training

<u>Date</u>	<u>Day</u>	<u>Time</u>	<u>Topic</u>	<u>In-Person/Virtual</u>	<u>Presenter/Facilitator</u>
3/18/2024	Monday	10am-noon	Overview of Department & Needed Forms	Zoom	Carla Byrd
3/19/2024	Tuesday	10am-noon	Requisition: How To & Navigating Through the Website	Zoom	Elena Ely and Pamela Hurley
3/20/2024	Wednesday	10am-noon	Quotes (Computer), Sole Sources, and Solicitations	Zoom	Cathy Curtis and Pamela Hurley
3/21/2024	Thursday	10am-noon	Hands On Requisition Entry	In-Person	Elena Ely, Pamela Hurley and Cathy Curtis
3/22/2024	Friday	10am-noon	Hands On Requisition Entry	In-Person	Elena Ely, Pamela Hurley and Cathy Curtis
3/25/2024	Monday	10am-noon	Navigating through the Website, P-Card Process & Travel Process	Zoom	Marcey Bennett and Marcie Meeves
3/26/2024	Tuesday	10am-noon	Kuali Form Review: Copy Center, Miscellaneous Vouchers	Zoom	Sundance Knox, Katie Short and/or Anthony Garrison
3/27/2024	Wednesday	10am-noon	Auditor's Review: Importance of Proper Documentation	In-Person	Bradley Fondren
3/28/2024	Thursday	10am-noon	Review of Insurance Requirements for various purchases and documentation needed.	In-Person	Kevin Bennett
3/29/2024	Friday	10am-noon	Contract In-Take Form	In-Person	Attorney Michael Huff

NOTE: Elena Ely serves as the point of contact. All sessions will be recorded for future use.

Business Services Organization Chart



PROCUREMENT SERVICES

Objective

Primary objective of the Procurement Services is procuring, in the most efficient and cost-effective manner, the goods and services that support the education, research, and services efforts of UAH, while complying with the Federal and State statutes and UAH policies that govern institutional purchases.

Authority

Procurement Services has been vested with the sole authority to obligate UAH funds to outside vendors; therefore, procedures must assure honesty, integrity, and fairness.

Alabama State Law

UAH is considered an entity of the state.

Must comply with the State Competitive Bid Law.

Purchase Requests that cumulatively total \$75,000 or more within a fiscal year period are subject to the competitive bid law.

PROCUREMENT CARD SERVICES

Procurement Card (P-Card) Program

The Procurement Card is a VISA product administered by the U.S. Bank.

The Procurement Card is implemented to provide a more efficient system, purchasing and payment of small-dollar goods and services, as well as travel.

Procurement Card (P-Card) Program Benefits

Vendors receive cash payment from U.S. Bank within 48 to 72 hours.

Vendors experience a reduction of credit risk.

Vendors experience reduced billing and collection costs.

Reduces processing costs for UAH at all levels by reducing the number of invoices and checks processed.

Rebate!!!!

PROCUREMENT CARD SERVICES

Procurement Card (P-Card) Program

Due Dates and Checklist

Monthly Reconciliations due the 15th of the following month.

Reminders of due date sent to departments the 5th and 10th of each month.

P-Cards with outstanding reconciliations on the 16th of the following month are temporarily closed.

P-Cards with outstanding reconciliations on the 20th of the following month jeopardize all cards within the department to be temporarily closed.

Note:

Business Services' webpage provides the allowable purchases, non-allowable purchases, process for obtaining a p-card, p-card manual, etc.



PROCUREMENT CARD SERVICES

Travel Program

The Board of Trustees of The University of Alabama Board Rule 413, Travel Guidelines, is the official guidelines for UAH.

Copies of Board Rule 413 may be obtained from the Office of the Vice President for Finance Administration upon request or on the internet at <http://uasystem.ua.edu/board-of-trustees/board-manual/>

It is the policy of UAH to reimburse its employees who travel at the request of UAH for reasonable and necessary expenses incurred while traveling on authorized UAH business.

Travel Updates found on the Business Services' webpage.

Helpful Videos, such as the comprehensive Travel Reimbursement Training, held February 2, 2024, found on the Business Services' webpage.

MAIL SERVICES

Objective

Mail Services provides for the postal needs of UAH, including faculty, staff, and students.

Authority

Mail Services complies with all federal, state, and local postal regulations.

Mail Services follows the requirements of the U.S. Postal Service.

Operational Hours for Delivery, Collection and Outgoing Mail

Morning Mail Delivery and Collection from 11:00am-12:30pm

Final dispatch of outgoing mail to U.S. Postal Service and commercial handlers at 2:00pm
& Bulk Mail, Accounting Mail also at 2:30pm.

Hours of Operation: Monday-Friday, 7:15am-4:00pm

Mail Services located in the Central Receiving Building at the south end of campus.



COPY CENTER

Objective

Copy Center is a full-service print shop located in the Business Services Building.

Copy Center is to ensure customer satisfaction, reliability and high-quality services to meet printing and copy needs (desktop publishing, duplicating, and printing services).

Helpful Tips

To place an order for printing services, complete an order form using the Kuali form.

Before placing an order for printing services, consider the following:

Confirm funds are available in your budget.

Know your approval process to follow.

Know your order needs.

Know your delivery date needed for your order.

Shipping and Receiving

Objective

Central Receiving (Shipping and Receiving) receives, distributes, and ships material for UAH.

Shipping Procedures

All shipments must include a completed Shipping Order Form.

Form not necessary for prepaid shipments.

Receiving Procedures

Central Receiving is the central location for receiving UAH purchased items, unless otherwise indicated on the Purchase Order.

Central Receiving will deliver received items to the departments.

Note:

Equipment delivered directly to the departments by the vendor must be reported immediately to Asset Management.

Any damage must be reported within five days to the Procurement Professional (Buyer).



Business Services Organization Chart

