

Business Services
CUSTOMER GUIDE



THE UNIVERSITY OF
ALABAMA IN HUNTSVILLE

uah.edu/business-services

To ALL OF OUR CUSTOMERS:

We have found that effective communication of policies, procedures, and services available through the Business Services department is an ongoing challenge. To assist in meeting that challenge, this brief desk-top brochure has been posted to our website.

We hope this quick and handy guide will answer the most commonly asked questions regarding Business Services. For additional information, please call us at **256-824-6484**.

Thank you,
Business Services Staff

SPECIALTY SERVICES

- Procurement Card (P-Card)
- Procurement Officer visits
- Procurement procedure consultations and workshops
- Small Business and Small Disadvantaged Business Vendor Listings
- Call Us First Campaign – If in doubt, “Call Us First” at **256-824-6484** and we will help you through the procurement process

CUSTOMER SERVICES

Procurement Services, 256-824-6484

- Process Requisitions and issue Purchase Orders to procure goods and services for the University
- Provide information about products, prices, and specifications
- Expedite delivery of urgently needed goods and services
- Insure that purchases conform to State and Federal statutes and University policies that govern institutional procurement
- Refer information about new or improved products to departments
- Provide insurance coverage on all buildings and their contents
- Process Contracts for Professional Services
- Generate requests for bids
- Manage equipment maintenance agreements

- Provide on-line Requisition training and consultations
- Maintain vendor catalogs
- Provide vendor listings
- Provide certificate of insurance and evidence of coverage
- Promote and maintain the Procurement Card (P-Card) Program

Mail Services, 256-824-6116

- Process official University business mail, daily pick-up and delivery
- Process Certified and Insured mail
- Process official University business express mail
- Process International and Registered mail
(University business mail only)
- Process 1st and 3rd Class mail (upon request)
- Provide daily campus courier service
- Accept and dispatch personal mail

UAH Copy Center, 256-824-6383

- Print business cards, letterhead, envelopes, invitations, theses, brochures, and much more
- Print bulk mailing documents; fold, affix labels, and deliver to Mail Services
- Print color copies
- Provide printing services to Faculty, Staff, and Students
- Provide paper for campus copy machines
- Provide service and supplies to Xerox copiers

Central Receiving & Shipping 256-824-6315

- Receive all parcels and packages shipped to the University
- Daily delivery of parcels and packages to respective individuals and departments
- Process all outgoing shipments
- Provide temporary, limited storage
- Furnish industrial gases and alcohol products under strict control
- Assist in the organizing of auctions/surplus property sales for obsolete and/or surplus equipment
- Provide a complete shipping facility capable of handling any size package or freight item
- Maintain accurate and reliable records of capital equipment (property) over \$5,000 acquired by the University

- Maintain accurate and reliable records of all desktop-laptop-tablet computers and servers costing \$1,000-\$4,999; tagged as non-capital equipment
- Provide updated inventory list to all departments

AUTHORITY

The Associate Vice President of Finance and Business Services has been vested with the sole authority to obligate the University funds to outside vendors and has been delegated the responsibility for administration of policies. No individual has the authority to enter into procurement contracts or in any way obligate the University unless authorized by Procurement Services.

The University's policy is: "The University will assume no obligation except on a previously issued and duly authorized Purchase Order." An individual who obligates the University without authorization may be held personally responsible for the obligation.

Firms ordinarily conducting business with the University are made aware of this policy and are advised that all purchases chargeable to the University must be covered by an official University Purchase Order.

DID YOU KNOW...

The University of Alabama in Huntsville must comply with the State Competitive Bid Law. All Purchase Orders or contracts involving \$15,000 or more made for or on behalf of the Board of Trustees of The University of Alabama in Huntsville, regardless of its nature, shall be let by free and open competitive bidding, on sealed bids, to the lowest responsible bidder, except as otherwise provided. This policy is true for all Purchase Orders and contracts involving \$15,000 or more whether contracts involve labor, services, or the purchasing or leasing of materials, equipment, supplies, or other personal property. Competitive bids will be obtained for purchases less than \$15,000 when considered to be in the best interest of the University.

EXPECTING & SHIPPING A PACKAGE

Central Receiving & Shipping is the central location for receiving University-purchased items, unless otherwise indicated on the Purchase Order. Central Receiving will make same day deliveries of all items received, except for large orders that require special handling instructions by the departments.

UAH forklift capacity is 6,000-pounds. If ordering equipment larger than 6,000-pounds, contact a Procurement Officer before the Purchase Order is issued to make arrangements for unloading.

Capital equipment (valued at \$5,000 or greater) delivered directly to the departments by the vendor must be reported immediately to Asset Management, **256-824-6315**. When signing for packages, the departmental representative must inspect the package(s) to insure correctness of the contents and to identify possible damage to the contents. Any damage must be reported to the Procurement Officer within five working days of receipt.

Central Receiving & Shipping also provides a complete shipping facility. However, Central Receiving and Shipping does not supply shipping containers or packing material. If a wooden crate is needed for shipping, contact Facilities & Operations, **256-824-6482**. Central Receiving & Shipping has the authority to ship all official University merchandise. All shipments must include a departmental account number to which the shipping will be charged.

If received merchandise is found to be defective, incorrect, unordered, or duplicated and needs to be returned, contact the Procurement Officer so a return authorization may be obtained from the vendor.

INSURANCE

Business Services obtains insurance coverage for The University of Alabama in Huntsville. Among the policies administered by Business Services are Fire and Extended Coverage for all University-owned buildings and contents, as well as Fleet Insurance. The Fleet policy provides primary physical damage coverage for all University-owned, 7-model year-old and newer vehicles. Coverage is also provided for all "hired" vehicles, which includes those rented by University employees for use in University business. Property damage coverage carries a \$1,500 deductible. However, when driving a personal vehicle on University business, the driver's insurance would be considered primary and the University's fleet coverage secondary.

Fleet Services: University employees may use University-owned vehicles for local and out-of-town travel when on official business. These vehicles are available through Fleet Services, administered by Facilities & Operations, according to established institutional policies. For more information, go to <http://www.uah.edu/facilities-and-operations/facilities/fleet> or call **256-824-6482**.

Asset MANAGEMENT

All equipment over \$5,000 must be tagged with a bar code label on receipt. Asset Management (AM) conducts a campus-wide survey every two years. The accountability for equipment lies, however, with the Budget Unit Head, who is responsible for all property assigned to his or her area. Call Asset Management, **256-824-6315**, for information concerning:

- Controlling property
- Equipment screening
- Disposing of surplus and/or obsolete equipment from inventory records
- Obtaining surplus material and equipment

Changes: Asset Management functions primarily as a data collection center. The accuracy of their data records depends on the cooperation of each department to inform Asset Management (AM) of equipment changes. To notify AM of equipment changes or transfers, you must complete the Property/Relocation Transfer Form (UAH/INV Form-010, Rev. 1/19), which is available on-line.

Surplus: To have surplus property picked up, complete the Surplus Pick-Up Request Form. Keep one copy and forward the original to Central Receiving (CRB 100).

PROCUREMENT OF GOODS OR SERVICES

Goods or services can be purchased in several ways as briefly explained below. Contact Procurement Services for further information.

Procurement Card (P-Card)

The P-Card is designed to simplify the procurement of goods and services costing up to \$1,999.99. Taking advantage of this program requires only that

previously existing guidelines for the purchase continue to be followed, that purchases further the business of the University, that purchases are authorized by the department head or budget manager, that complete and accurate documentation of purchases be maintained and reconciled to the monthly statement, and that the purchases are made from contracted suppliers when possible.

Requisitions

To procure goods and/or services, a Requisition must be completed and submitted electronically via the UAH Banner Self Service Requisitioning System. Be sure to describe the goods and/or services completely. After all electronic approvals have been submitted, the Requisition is ready for further processing by Procurement Services. Forward to Procurement Services all applicable supporting documentation (e.g., copy of Contract, Travel Authorization form, Order form). Under normal procedures and depending on the dollar value of the Requisition submitted, Requisitions are processed into Purchase Orders within one to two days.

Blanket Purchase Orders

If a department needs to obtain a number of miscellaneous, non-equipment items from the same vendor over an extended period, the department may initiate a Requisition for a Blanket Purchase Order. The department may also use Blanket Purchase Orders to encumber funds against contracts or purchase agreements. The period of encumbrance cannot extend beyond the current fiscal year; also, it cannot exceed the State Competitive Bid Law requirement of \$15,000. Memorandum Receiving Reports must be completed after each purchase.

ISSUING A PURCHASE ORDER

The following chart explains bid quotation requirements and processing time (after Requisition approval has been completed), based on the cost of the item(s).

Cost	Bid Quotation	Processing Time
Under \$15,000	Procurement Services receives informal quotations	1-2 days
\$15,000 & over	Procurement Services receives formal bids	2-3 weeks

EXPEDITING/STATUS CHANGES TO PURCHASE ORDERS

A Change Order is required when an adjustment or alteration is made to a Purchase Order. Contact the Procurement Officer who issued the Purchase Order when you:

- Have questions about your Purchase Order
- Need to make changes to the Purchase Order
- Check delivery status of the Purchase Order
- Receive incorrect or damaged merchandise
- Receive duplicate or unordered shipments
- Need shipping information to return merchandise

EMERGENCIES!!

Departments can submit emergency Requisitions, and pick up their Purchase Orders between **8:15 a.m. - 5:00 p.m., Monday-Friday, or have them faxed/emailed to the vendor.** If you choose to pick up your Purchase Order, it should be picked up within 24 business hours after notification. The Procurement Services Staff will do their best to meet the required delivery date.

To submit an electronic Requisition, follow the instructions in your "UAH Banner Self-Service Requisitioning Workbook." Be sure to type "RUSH" in the Commodity Code field.

Email Procurement Services at purch@uah.edu after all approvals have been obtained. Indicate "Walk-Thru" or "Rush" in the subject line of your email and reference the Requisition number. Include the vendor name in the message.

Fax (**256-824-6151**), email (purch@uah.edu), or deliver all supporting documentation (e.g., order form, Travel Authorization Form) to Procurement Services. The Requisition cannot be completed until your supporting documentation has been received.

You will receive a telephone call once your Purchase Order is completed. **If it is possible, your order will be faxed /emailed to the vendor. If you elect to pick-up your Purchase Order, it will be your departments' responsibility to place the order with the vendor.**

CONTRACTS FOR PROFESSIONAL SERVICES

Whenever departments require services that cannot be provided by an employee, a Contract for Professional Services can be executed with an individual or a company. The necessary forms and Terms & Conditions are available online. The completed contract, approved by the Budget Unit Head and signed by the Contractor, should be submitted in duplicate to Business Services. All contracts are reviewed by Office of Counsel and signed by the appropriate Vice President. Please refer to Business Services Policies and Procedures Manual.

CORRECT UNIVERSITY SHIPPING/MAILING ADDRESS

Except for mail and package shipments for the Bud Cramer Research Hall (CRH) and the Aerophysics Research Center (ARC) on the Arsenal, the correct University mailing address is:

The University of Alabama in Huntsville

Attn: (Receiver and/or Department-if applicable "PCard")
(Purchase Order Number – if applicable)

301 Sparkman Drive
Huntsville, AL 35899

To send mail and package shipments directly to CRH or ARC, use the following:

Bud Cramer Research Hall

Attn: (Receiver and/or PO number – if applicable, or "PCard"
if applicable)

320 Sparkman Drive
Huntsville, AL 35805

Aerophysics Research Center (or use ARC)

Attn: (Receiver and/or PO number – if applicable, or "PCard"
if applicable)

PO Box 999
6230 Anderson Road
Redstone Arsenal, AL 35898

For personal mail received on campus, use the following address:

(Your Name and Your Department)

Attn: Personal

301 Sparkman Drive

Huntsville, AL 35899

DEALING WITH VENDORS

Departments are encouraged to seek information on products and services from vendor representatives. They are a valuable source of information.

Procurement Services should also be advised of your needs so they can assist in locating vendors and developing a procurement plan. To help you in dealing with vendor representatives and avoid some common pitfalls, the following guidelines are suggested:

1. Advise Procurement Services **in advance** of contacting vendors. Procurement Staff can provide additional information.
2. Contact **more** than one vendor whenever possible. The more alternatives you have, the better.
3. Give **equal** information to all vendors so each has an equal opportunity to compete.
4. Discuss all aspects of your needs. Use a **life cycle approach**. Consider what happens after the department owns the equipment. Where does the vendor's responsibility end? What about maintenance? Operational skills? Repair?
5. State on your Requisition a **complete** description of the item and attach all pertinent information about the suggested vendor (e.g. name of company, representative spoken to, address, telephone number) and any product literature.
6. Do not commit the University by telling a salesperson he or she has the order. **Only a Purchase Order issued by Procurement Services can commit the University.** (To commit otherwise may commit **yourself**.)
7. **NEVER** accept payments or gifts from vendors.
8. **Guard against overreaction** to a vendor-created crisis (e.g., "Price goes up next month" or "This is the last one in stock").
9. Don't wait until the last minute to submit your Requisition. The more time Procurement Services and the vendor have to process the purchase, the better the job can be done for you.
10. **Never** place orders that are the result of unsolicited phone calls to you. Such items have been found to be overpriced and inferior in quality or possibly a vendor's scam.

CODE OF ETHICS

The following Code of Ethics has been adopted by The University of Alabama in Huntsville from the National Association of Educational Procurement (NAEP):

1. Give first consideration to the objectives and policies of my institution.
2. Strive to obtain the maximum value for each dollar of expenditure.
3. Decline personal gifts or gratuities.
4. Grant all competitive suppliers equal consideration insofar as State or Federal statutes and institutional policies permit.
5. Conduct business with potential and current suppliers in an atmosphere of good faith, devoid of intentional misrepresentation.
6. Demand honesty in sales representation whether offered through the medium of a verbal or written statement, an advertisement, or a sample of the product.
7. Receive consent of originator of proprietary ideas and designs before using them for competitive purchasing purposes.
8. Make every reasonable effort to negotiate an equitable and mutually agreeable settlement of any controversy with a supplier; and/or be willing to submit any major controversies to arbitration or other third party review, insofar as the established policies of my institution permit.
9. Accord a prompt and courteous reception insofar as conditions permit to all who call on legitimate business missions.
10. Cooperate with trade, industrial, and professional associations and with governmental and private agencies for the purpose of promoting and developing sound business methods.
11. Foster fair, ethical, and legal trade practices.
12. Counsel and cooperate with NAEP members and promote a spirit of unity and a keen interest in professional growth among them.



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