A series of thin, black, overlapping lines forming various geometric shapes and polygons, primarily located in the upper left and center of the page. The lines are straight and intersect to create a complex, abstract pattern.

INTRODUCTION TO PURCHASING

Angela Gurney

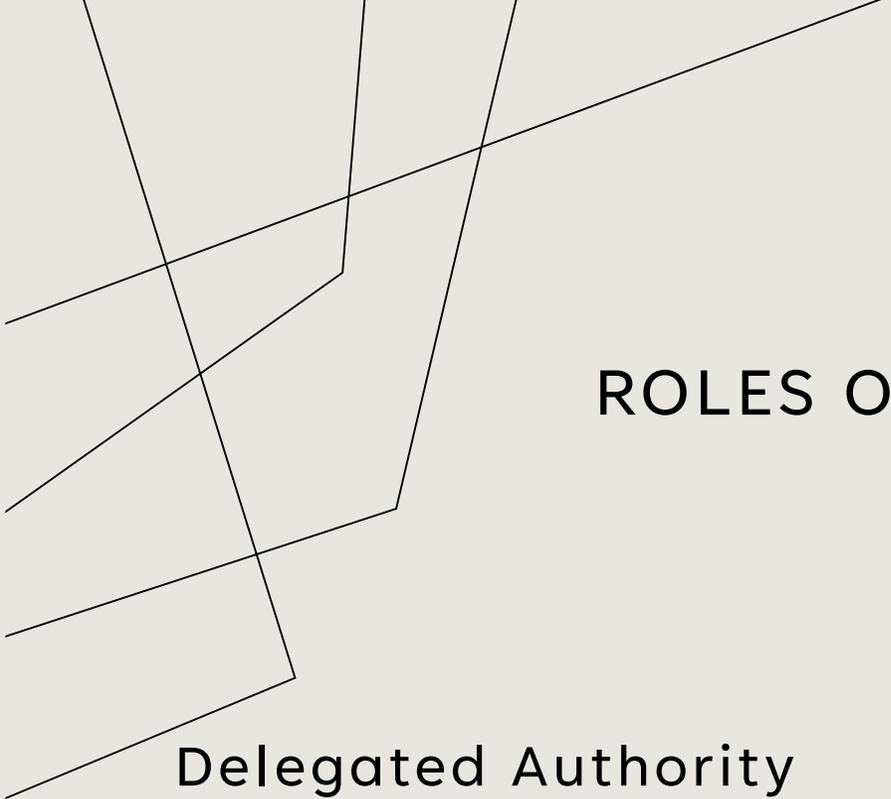
OUR TEAM

Miguel Gatmaytan – pCard Program Manager, miguel.Gatmaytan@seattlecolleges.edu

Lisa Gacer – Senior Buyer IV, lisa.gacer@seattlecolleges.edu, primary purchasing contact for North

Jasmine Jackson – Senior Buyer III, Jasmine.Jackson2@seattlecolleges.edu, primary purchasing contact for Central

Angela Gurney – Director of Purchasing, angela.gurney@seattlecolleges.edu, primary purchasing contact for South



ROLES OF APPROVAL AND AUTHORITY

Delegated Authority

The authority for a budget manager to determine whether a purchase is appropriate for their specific department

Budget Authority

The authority for a budget director to determine whether the purchase is allowable with the requested funding and whether the funding requested is available

Purchasing Authority

The authority for a buyer to complete a purchase transaction that has been approved by both delegated and budget authorities

DELEGATED AUTHORITY

Authority granted to Budget Managers to approve a purchase's relevance and appropriateness for their department.

For example, the Dean of Culinary Arts has delegated authority to approve the requisition of a new stove for instructional purposes.



BUDGET AUTHORITY

Authority granted to Budget Directors to approve the funding source and availability for a purchase within their respective campus or district office.

For example, the Budget Director at South Seattle College has the budget authority to approve the use of grant funds for the purchase of a new stove for Culinary Arts.

PURCHASING AUTHORITY

Authority granted by the Board of Trustees to Purchasing Department Staff to process a purchase request into a purchase order and complete a transaction on behalf of the Seattle Colleges District

Completing a transaction includes, but is not limited to:

- Creating and signing purchase contracts
- Signing purchasing agreements or quotes
- Any communication guaranteeing payment for goods and/or services
- Any communication approving the initiation of work with the intent to pay for those services
- Submitting a purchase order to a supplier

For example, the Senior Buyer has the purchasing authority to process a requisition into a purchase order and submit the PO to a supplier for the purchase of a stove for Culinary Arts.



WHO HAS PURCHASING AUTHORITY

The only positions within the Seattle Colleges District with purchasing authority* are the Director of Purchasing and Buyers within the purchasing department.

Currently, the people in those positions are Lisa Gacer, Jasmine Jackson, and Angela Gurney.

Please do not make or sign any quote, agreement, or contract that binds Seattle Colleges into payment

* Pcard custodians and approved purchasers for department Pcards have purchasing authority up to the Pcard purchase limit of \$3,500

POTENTIAL CONSEQUENCES OF UNAUTHORIZED PURCHASES

Seattle Colleges is subject to multiple audits per year. Should auditors discover purchases made out of compliance, we will be issued audit exceptions that follow with rigorous corrective action requirements which could limit the district's purchasing power in the future.

DIRECT BUY THRESHOLD AND CONTRACTS

Direct Buy : a purchase made with a vendor without a competitively sourced contract

-The WA state mandated limit for Direct Buy purchases from a single vendor is \$30,000 for the entire district for the entire fiscal year including PCard purchases.

-Purchases made from a vendor with a competitively sourced contract are not limited and must reference the contract used for tracking purposes.



SUPPLIER DIVERSITY

The State of Washington has developed a policy to increase the number of diverse suppliers and subcontractors within state agency procurement programs. This policy aligns with SCD's pre-existing Supplier Diversity Strategic Plan which aims to invite and include diverse vendors in all procurement processes.

The Purchasing Department will continually prioritize diverse suppliers in our purchasing processes and will make recommendations in alignment with those policies.

PURCHASE TYPES

1. Standard Goods and Services

- Contribute to day-to-day business operations, involve completion of an assigned task rather than an entire project. Services are generally repetitive, routine, or mechanical in nature that follow established or standardized procedures. Subject to solicitation regulations above direct buy limit.
- Can be purchased with a pCard up to \$3,500, purchases over \$3,500 require a purchase requisition

All Professional and Client Services must be on contract and therefore processed through the requisition → PO process

2. Professional Service

- Services that are professional, creative, or technical in nature and meet more specialized needs. Work is predominantly intellectual and varied, independent from the daily control of the agency and the consultant maintains control of work methods.
- Often require advanced or specialized knowledge

3. Client Service

- Any professional service that is performed with students as the direct audience

REIMBURSEMENTS

Authorized reimbursements via A19 are very limited. Authorized circumstances include:

- Emergency purchases as defined by RCW39.26.130
- Interagency Purchases
- Utility Payments
- Honorariums
- Purchases below \$3,500 only if PCards are not accepted
- Pre-approved travel, meals, coffee & light refreshment purchases

RCW39.26.130, Section 3:

As used in this section, "emergency" means a set of unforeseen circumstances beyond the control of the agency that either:

(a) Present a real, immediate, and extreme threat to the proper performance of essential functions; or

(b) May reasonably be expected to result in material loss or damage to property, bodily injury, or loss of life, if immediate action is not taken.

PCARDS

- Pcard single purchase limit - \$3,500
 - To request single purchase limit increase – email Miguel Gatmaytan and Angela Gurney who has authority to approve the purchase limit increase
 - To request a monthly credit limit increase – email Miguel Gatmaytan, Angela Gurney, and your Budget Manager who has authority to approve the monthly limit increase
- Pcard purchases count toward the annual Direct Buy Threshold of \$30,000
- Only Pcard custodian and approved users are permitted to make purchases using their department Pcard
- Custodians, Approving Managers, and Approved Users must complete training and sign user agreements to retain access to PCard





AUTHORIZED USES FOR PCARDS

- Instructional materials and supplies up to \$3,500 per purchase
- Purchases of coffee & light refreshments for meetings in accordance with proper procedures and pre-approval**
- Purchases of meals with meetings in accordance with proper procedures and pre-approval*
- Payment for goods and services below \$3,500 that do not require contracts

*Travel and meals with meetings are managed by a separate department, please connect with Heather Emlund with specific questions

**Coffee & Light Refreshments are managed by your Business Office

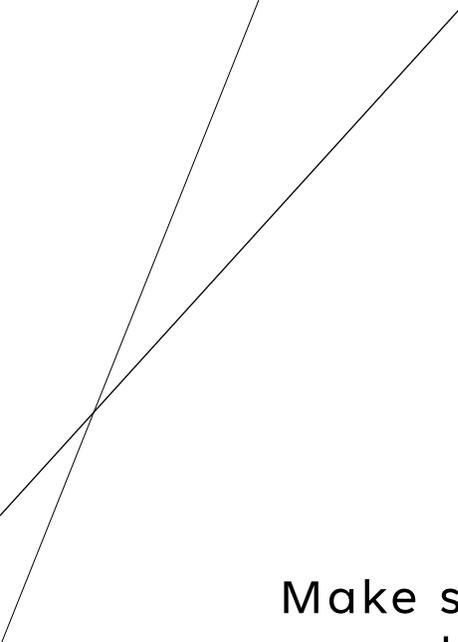
PROCESS OUTLINE FOR REQUISITIONS & PURCHASE ORDERS

Department identifies purchasing need, may gather quote or create SOW

Department creates requisition for goods and/or services, applies correct budget for approval from their budget office

Buyer may work with department to gather more information needed to procure the good or service or make vendor suggestions

Buyer processes requisition into PO, work directly with vendor, may create new contract or apply existing



BEFORE ENTERING A REQUISITION

Make sure you have your chart string ready

The requisition will have to pass a budget check to be submitted for manager approval.

If the requisition does not pass a budget check, purchasing will not be able to process it into a Purchase Order, even if it's approved.

Have any quotes ready to attach to the requisition

Have any and all documents, unsigned, saved into a single document so it can be attached to the requisition comments.

This will help purchasing understand what you're requesting for us to purchase.

Understand the timeline

Requisitions must pass a series of approvals before it's available for purchasing to process.

If a contract is required, this will take additional time. Planning is key!

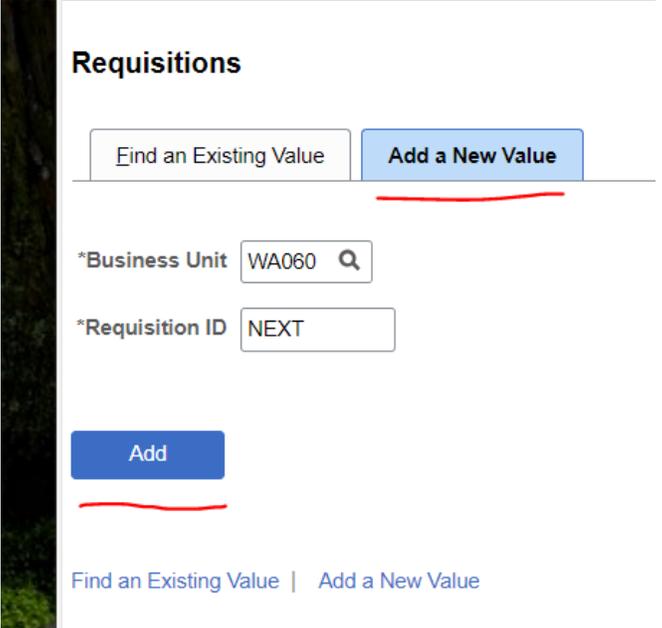
ENTERING A REQUISITION

Sign in to ctcLink. Find the Navigator in the top right corner (compass icon)

Menu > Purchasing > Requisitions > Add/Update Requisitions.

If Add a New Value is highlighted blue, click on the blue Add button. Do not enter a Requisition ID, leave it as NEXT. That will number the requisition based on the next chronological number available.

This will take you to a requisition form ready to fill out. Some fields will auto populate.



Requisitions

Find an Existing Value **Add a New Value**

*Business Unit WA060 🔍

*Requisition ID NEXT

Add

Find an Existing Value | Add a New Value

ENTERING A REQUISITION

Requisition Name : This is a very brief reference. You can put something like “Blanket Kone”, or “Central Tile Repair”.

Requester : Add your name

Add Comments : This is where you attach any substantiating documents such as unsigned quotes, proposals, and/or statements of work.

Maintain Requisitions

Requisition

Business Unit WA060 Status Open

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester Requester Info

*Requisition Date 01/23/2024 On Line Entry

Origin ONL Dollar

*Currency Code USD Amount Summary ?

Accounting Date 01/23/2024 Total Amount 0.00 USD

Requisition Defaults Add Comments

Requisition Activities Add Request Document

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

****Remember to save your requisition each time you enter new information. It might not auto save!**

ENTERING A REQUISITION

Only add comments and documents to the Header Comments. Do not add documents to line items in the requisition.

To attach multiple documents and/or sets of comments, click the + button in the top right corner of the comments box and click OK after each addition.

Maintain Requisitions

Requisition

Business Unit WA060
Requisition ID 0000002790
Requisition Name 0000002790

Header

*Requester 101026227 Sean Chesterfield
*Requisition Date 05/18/2023
Origin ONL On Line Entry
*Currency Code USD Dollar
Accounting Date 05/18/2023

- Requisition Defaults
- Requisition Activities
- Document Status
- Add Comments
- Add Request Document

Add Items From

Header Comments

Business Unit WA060 Requisition Date 05/18/2023
Requisition ID 0000002790 Status Open

Retrieve Active Comments Only

*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments

Use Standard Comments Comment Status Active

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment	Attach	View	Delete	Email
------------	--------	------	--------	-------

ENTERING A REQUISITION

Line [?]

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	<input type="text"/>	<input type="text" value="0.0000"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	0.00	Open

[View Printable Version](#) [View Approvals](#) *Go to ...More...

Item : Not a required field. Please note that if you select an item from this list it may change your account code in your chart string. Be sure to double check your chartstring before submitting.

Description : This is a more detailed description of what you're requesting purchasing to buy on your behalf. It should include any contract numbers (if applicable), quantity, and a description of your item. You can also request specific vendors here.

Quantity : This must always be 1.

UOM : Eaches

Category : Select best fit

Price : If you are purchasing multiples, this should be the extended price. This should not include tax.

ENTERING A REQUISITION

Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |||

Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
test 123	1.0000	EA		100.00000	100.00	Open			

From the requisition page, scroll to the right and click on the small page icon. (above)

It will take you to a more detailed page to enter line item information. To enter your chartstring information, click on the page with 3 arrows.

Line

1	Item	test 123	Quantity	1.0000	Each	Merchandise Amt			
Schedule									
[List Icon] [Search Icon]									
[Details]									
Sched		*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To		
1		DOMAINS	1.0000	100.00000	100.00		Angela Gurney		

ENTERING A REQUISITION

1/1/2017

Maintain Requisitions

Distribution

Requisition ID NEXT
 Line 1
 Schedule 1
 Ship To DOMAINSH DO-MAIN SH
 *Distribute By
 SpeedChart [Multi-SpeedCharts](#)

Item test 123
 Status Active
 Quantity 1.0000 EA
 Open Quantity 1.0000
 Merchandise Amt 100.00 USD

**This chart string information will come from your department manager and/or your budget director. They can let you know which fields you need to enter. Below are some of the more common chart string fields.

Distributions

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Approp	Dept	Class	State Purpose
1	Open	<input type="text" value="100.0000"/>	<input type="text" value="1.0000"/>	100.00	WA060 <input type="text"/>	<input type="text"/>						

Continued...

State Purpose	PC Bus Unit	Project	Activity	Source Type	Program	Subsidiary	Affiliate	Fund Affiliate	Oper Unit Affil	
<input type="text"/>	<input type="button" value="+..."/>									

ENTERING A REQUISITION

Once you are done entering your chart string, click OK and it will bring you back to the schedule page. From here, update your Ship To location to your campus.

Schedule

Business Unit WA060 Requis
Requisition ID NEXT
[Return to Main Page](#)

Line				
1	Item	test 123		
Schedule				
 				
Details 				
Sched		*Ship To		Quantity
1		<input type="text" value="DOMAINS"/> 		1.0000

[Add Ship To Comments](#)

[Save](#) [Notify](#) [Refresh](#)

ENTERING A REQUISITION

Once you have entered all line item details, return to the main page. Once there, it's time to run a budget check. Click on the icon with the glasses to run a budget pre-check. If valid, or provisionally valid, you can run a budget check by clicking on the icon with the magnifying glass.

Maintain Requisitions

Requisition

Business Unit WA060
Requisition ID 0000003495
Requisition Name S.Worksource Equip Request

Status	Open		
Budget Status	Not Chk'd		

ENTERING A REQUISITION

Once you have run a budget check and the budget is validated, you can submit for approval. Do this by clicking the green check mark in the upper right corner.

Maintain Requisitions Requisition

Business Unit WA060
Requisition ID 0000003495
Requisition Name S.Worksource Equip Request

Status	Open	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Budget Status	Not Chk'd		

Once submitted, your requisition will be sent to the appropriate approvers. Once it has been fully approved, it will move to a queue that purchasing is able to see and process into a purchase order.

THINGS TO NOTE ABOUT REQUISITIONS

- If you submit for approval before a budget check, the requisition will not be able to be processed into a PO.
- If a requisition is denied, it will not be editable and it can't be processed into a PO.
- You can save your requisition at any time during your process if you need to step away and come back to it. If you have not completed all required fields to save, you'll see a notification.
- Once submitted, you can return to your requisition and check the approval status

Line ?

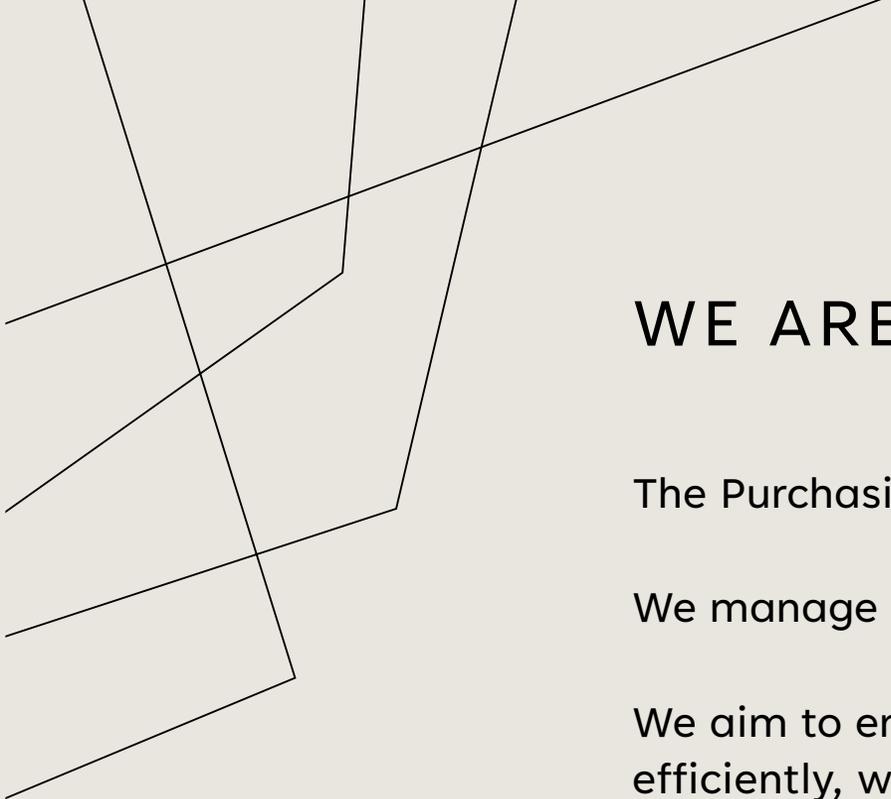
 

Details | Ship To/Due Date | Status | Supplier Information

Line		Item	Description
1		<input type="text"/>	Dell Latitude 54

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[View Approvals](#)



WE ARE HERE TO SUPPORT YOU!

The Purchasing Department serves as a layer of risk management.

We manage purchasing regulations, so you don't have to!

We aim to ensure that all procurement is done effectively, efficiently, with the best pricing, and within state, federal, and district guidelines.

**add slide on resources

Questions?



THANK YOU