

# PROCUREMENT SERVICES NEWSLETTER

*Grand Valley State University, Zumberge Hall Suite 2015*



## Banner 9 Admin Available Now!

As some of you may know, Banner 9 Admin is now available to start using for your day-to-day functions. While you currently have the option to use either Banner 8 or Banner 9 Admin, as of January 21, 2019, Banner 8 will no longer be available.

Banner 9 Admin is the equivalent of Internet Native Banner. You can access both at the following link. We suggest bookmarking this page for easy access.

<https://www.gvsu.edu/banner.htm>

We hope you were able to attend one of our training sessions in October to learn about navigating the new system and creating requisitions. If not, keep an eye out on Sprout for more sessions and check out our Banner 9 Admin resources (including video tutorials):

<https://www.gvsu.edu/purchasing/resources-191.htm>

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## Backup Documentation and Requisition Checklist

Procurement Services has created a checklist to assist departments with navigating the various requirements of the requisition process. It is important to note that all purchases of \$5,000 or more as well as any payment made to a person, regardless of amount, require a requisition.

The first page of the checklist offers a glimpse into everything that Procurement Services evaluates when reviewing the backup documentation for your requisition. Every requisition requires some form of backup documentation according to the nature of the purchase. To make the process as smooth as possible, we recommend following these guidelines when collecting your backup documentation. We find that most delays in processing requisitions are often a result of insufficient or incorrect backup documentation.

Not every purchase will require every item on the checklist, it is important to determine what is required based on the nature of your purchase. If you have any questions, don't hesitate to contact Procurement Services.

The second page of the checklist provides considerations for information to include on your requisition in Banner. Additional verbiage can be included as Item or Document Text. It is also very important to pay close attention to the FOAP you are using for your requisition. If you have questions about the appropriate FOAP, please contact your Accountant.

This checklist is provided as a courtesy for departments. It is not required to be completed and submitted with your backup documentation. Feel free to contact Procurement Services with any questions.

## Purchasing Card Program Auditing Update

Thank you for your continued adherence to the Purchasing Card Program Policy. As a result of your diligence, we have seen significant improvements in program compliance.

Please note, as a courtesy to you, OnBase scanning is still available! Send over your completed statement packets to [pcardadmin@gvsu.edu](mailto:pcardadmin@gvsu.edu) and Procurement Services will load your documents into OnBase. Learn more about OnBase scanning.

**Thanks to you, the frequency of our top 5 violations has significantly decreased:**



## Backup Documentation & Requisition Checklist

For all purchases of \$5,000 or more (and payments made to individuals, regardless of amount), departments must submit a requisition in Banner Admin to initiate the generation of a purchase order. After a requisition has been completed and approved, the Procurement Services office checks it for accuracy and makes sure that all required documentation has been submitted to ensure that the subsequent purchase order is issued in compliance with all University policies. Before you submit your requisition, use this checklist to make sure you have all of the required documentation and information in order to expedite the processing.

### BACKUP DOCUMENTATION REQUIREMENTS

All backup documentation must be submitted to Procurement Services by intercampus mail (2015 JHZ), fax (616-331-3287) or email ([purchasing@gvsu.edu](mailto:purchasing@gvsu.edu))

- ☐ A contract, agreement or quote to support the purchase
  - ☐ Contract, agreement or quote is signed by all parties
  - ☐ Contract, agreement or quote details the payment terms (invoicing, down payment, etc.)
- ☐ If installation is required for the purchase, documented (email) approval from the appropriate department is required
  - ☐ Allendale: Contact Facilities Planning [studentf@gvsu.edu](mailto:studentf@gvsu.edu)
  - ☐ Grand Rapids and Regional Campuses: Contact Facilities Services GR [dcoper@gvsu.edu](mailto:dcoper@gvsu.edu)
- ☐ Purchases of IT software and/or equipment require documented (email) approval from Information Technology Technology Supply Office: [techsupply@gvsu.edu](mailto:techsupply@gvsu.edu) | [Technology Supply Policy](#)
- ☐ Maintenance or support that is required for purchases of equipment and/or software must have an agreement
  - ☐ Maintenance/Support agreement must be signed by all parties
  - ☐ Maintenance/Support agreement must have date(s) of service
- ☐ If you are working with a person performing a service, the correct documentation is required depending on the nature of the service(s) – see below
  - ☐ Speaking engagements/presentations: [Honorarium Form](#)
  - ☐ All other services: [Independent Contractor Agreement \(RO\)](#) if individual will be invoicing [Independent Contractor Agreement \(CW\)](#) if a lump sum payment is required (no invoicing).  
**Note: the 20 Questions Form on pages 2-3 is also required per IRS regulations.**
- ☐ If the vendor or individual you are working with is new or there have been no transactions in 3 years or more, a [W9](#) is required to collect EIN and SSN information
  - ☐ **International Companies:** a [W-8BEN-E](#) form is required instead of a W9
  - ☐ **International Individuals:** a [W-8BEN](#) form is required instead of a W9
    - ☐ A [Foreign National Information Form](#) must be completed by the international individual and sent to Luanne Brown [brownlua@gvsu.edu](mailto:brownlua@gvsu.edu)
- ☐ Competitive Sourcing Requirements – See [Bid Thresholds](#) or [contact your Buyer](#) for assistance
  - ☐ Sole Source Justification if no bids were solicited
  - ☐ Bid documents if bids were solicited



## BANNER REQUISITION REQUIREMENTS

Please include all information below on your requisition in Banner. Dates and details can be added using the [Item and/or Document Text](#) options.

- ☐ Contract start and end dates (if applicable)
  - ☐ Dates must be in the format of a start and end date (ex: July 1, 2018 – June 30, 2019) NOT in a month count format (ex: 12 months)
- ☐ Include preferred method of PO or check delivery (if applicable)
  - ☐ If you would like the PO emailed to the vendor, include the email address
  - ☐ If you would like the PO mailed to a different address, include the new address
  - ☐ If you would like to hand the check to a speaker/performer after the event, please indicate which method you prefer for check pickup/delivery prior to your event.
    - ☐ **Call or Email** for check pickup: Indicate the date the check is needed as well as the name and extension or email address of the person to contact
    - ☐ **Intercampus Mail:** Include the date the check is needed and the name, building abbreviation and room number of the delivery address
- ☐ Make sure you are using the correct FOAP on your requisition
  - ☐ If the contract crosses fiscal years: use account code 7389
  - ☐ If you are purchasing fixed assets/taggable equipment, use the correct account code. Contact your Accountant for assistance in determining if the equipment you are purchasing should be capitalized
    - ☐ 7602: Equipment > \$5,000
    - ☐ 7603: Computer Equipment > \$5,000
    - ☐ 7604: Computer Software > \$5,000
    - ☐ 7605: Furniture > \$5,000
    - ☐ 7606: Office Equipment > \$5,000
  - ☐ If you are leasing property/space or vehicles
    - ☐ 7027: Lease/Rental Payment
    - ☐ 7532: Leased Vehicle
  - ☐ If you are using grant funds for your purchase, make sure you are using the correct FOP and account code for the purchase – contact your Grants Accountant for assistance
- ☐ If you are trading in any equipment, include the make, model, trade-in value and asset tag number on the requisition and send the asset tag via intercampus mail to Procurement Services 2015 JHZ. [Disposal Policy](#)

## CONTACT INFORMATION

If you have any questions, please contact a member of the Procurement Services department

Procurement Services	<a href="mailto:purchasing@gvsu.edu">purchasing@gvsu.edu</a>	616-331-2280
Valerie Rhodes-Sorrelle	<a href="mailto:rhodesv@gvsu.edu">rhodesv@gvsu.edu</a>	616-331-2283
Kip Smalligan	<a href="mailto:smalligk@gvsu.edu">smalligk@gvsu.edu</a>	616-331-3211
Aaron Caccamo	<a href="mailto:caccamoa@gvsu.edu">caccamoa@gvsu.edu</a>	616-331-3436
Heather White	<a href="mailto:whitheat@gvsu.edu">whitheat@gvsu.edu</a>	616-331-3058
Tonya Valencia	<a href="mailto:perezva@gvsu.edu">perezva@gvsu.edu</a>	616-331-2257

## DID YOU KNOW?

*Tax ID's and Social Security Numbers (SSN) should not appear on any document except official IRS forms: W-9, W-8-BEN or W-8BEN-E*

GVSU takes the security of our faculty, staff, students and vendors very seriously. In order to protect the personal identification information (PII) of our vendors, it is imperative that the only place vendors enter their Tax ID or SSN is on an official IRS form such as a W-9, W-8-BEN or W-8-BEN-E.

When working with vendors, we recommend using the Honorarium Form and Independent Contractor Agreements provided to you by Procurement Services. However, if you prefer to use your own speaker agreements or contracts, please make sure you are not requiring the vendor to enter any tax id or SSN information on those documents. This information can only be collected using an IRS form.

In addition, please make sure you are not entering any Tax ID or SSN information on the requisition in Banner. This is to ensure that only the individuals who need to see that information have access to it, and no one else. Contact us with any questions.

## New Office Depot Pricing!

Have you seen our new low pricing on ink and toner?



Procurement Services and Tech Supply have negotiated huge discounts on ink and toner cartridges ordered through Office Depot!

Log into your Office Depot account today to see our new low pricing. This pricing is direct from the manufacturer and varies by product. You should expect to see discounts on the ink and toner you already purchase!



## Upcoming Events & Deadlines

Holiday Break

December 22, 2018 -  
January 1, 2019

P-Card FOAP Reallocation Deadline  
for December Transactions

Friday, January 4, 2019

P-Card FOAP Reallocation  
Deadline for January Transactions

Tuesday, February 2, 2019



## GVSU Surplus Store Weekly Open Hours

Wednesday	9:00am - 4:00pm	<b>Location:</b>
Thursday	9:00am - 4:00pm	429 Standale Plaza NW
Friday	9:00am - 4:00pm	Walker, MI 49534

The Surplus Store will be closed for the holidays on Wednesday 12/26, Thursday 12/27 and Friday 12/28

## Contact Procurement Services

Procurement Services

616-331-2280

[purchasing@gvsu.edu](mailto:purchasing@gvsu.edu)

Kim Patrick, Valerie Rhodes-Sorrelle,  
Aaron Caccamo, Kip Smalligan,  
Heather White, Tonya Valencia

Purchasing Card Administrator

616-331-2280

[pcardadmin@gvsu.edu](mailto:pcardadmin@gvsu.edu)

Kip Smalligan, Aaron Caccamo,  
Heather White, Tonya Valencia

GVSU Surplus Store

616-331-9072

[surplus@gvsu.edu](mailto:surplus@gvsu.edu)

Rebecca Ramos