San Diego Miramar College
Purchasing FAQs

1. **What if the supplier is not in PeopleSoft? How do I obtain a Supplier ID? What is the process for entering a supplier into PeopleSoft?**

   To establish a new supplier, a requester, who reviews the existing database in PeopleSoft and does not find the supplier, must send a blank SDCCD Supplier Intake form and IRS W-9 form to the new supplier for completion. Forward the completed forms to the Business Office for processing. The Business Office will notify requester when supplier is available in PeopleSoft.

2. **What if the supplier is a consultant?**

   If the supplier is a consultant, the consultant will need to be set up in PeopleSoft. In addition, the consultant will need to complete the Consultant or Lecture Agreement. Once the agreement is signed by the consultant, the end-user shall send the agreement to the Business Office or assigned Buyer for SDCCD Purchasing Director's signature. The approved agreement will be returned to end-user to upload to the requisition.

3. **When requesting a quote, does the shipping or freight need to be included?**

   If supplier will be charging freight or shipping costs, the quote should contain the actual or an estimated cost. If quote does not contain a freight or shipping cost, it is presumed there is not a separate cost.

   If a shipping or freight cost is later invoiced, but not included on quote, a change order will need to be processed which will impact budget and may delay payment to supplier. Clarify before the supplier provides a quote whether a shipping charge will occur.

4. **I am drafting a requisition, when can I expect a purchase order to be issued (dispatched) to the supplier?**

   Completed requisitions route through multiple approvers based on the funding source used. Funds are encumbered immediately once requisition is budget-checked and submitted. Once requisition is approved, the Buyer will then review for accurate and complete description, proper category code, asset tagging information, quote attachment, final location/destination for delivery and other clarification comments. If requisition is approved by Buyer, it will dispatch as a PO to supplier. The requisition process can be tracked within the Manage Requisitions screen. The process takes about 5-7 business days to complete.

   If at any time during the approval process, a requisition is denied, the requester will be notified via a PeopleSoft generated email.

5. **Whom do I contact if I am having trouble entering a requisition into PeopleSoft?**

   Please contract Business Office for troubleshooting or training.

6. **Where do I attach supporting documentation (i.e., quotes, etc.)?**

   All supporting documents are to be attached as one single attachment to Line 1 of the requisition.

7. **How should I enter the description for each line item?**

   The **ARMA format** is recommended for purchase requisitions. This helps to give consistency to requisitions and purchase orders being processed.

   ARMA format rule: Noun, Description, Manufacturer (if applicable), Model/Product Number.

   Example A: MONITOR, LCD 22" WIDE 1680X1050 W/SPKR, MICROSOFT, P/N# KL3561
   Example B: LAPTOP, ELITE BOOK X360 1030 G2 FLIP

8. What is the definition of a Supply?

Tangible items less than $200 are considered a supply. Consumable items that exceed $200 may also be considered a supply if they have a life expectancy less than one year. Contact Business Office for additional direction if needed.

9. When do I enter Asset Information into a requisition?

Enter Asset Information into a requisition if:
- Any singular item is over $1,000, including shipping and tax
- Any line item contains Computer/AV/IT equipment with a value of $200 or greater
- Any line item contains Software (hard disk or download) with a value of $200 or greater
- Any line item contains a Firearm

10. What end user contact information is needed on requisitions?

The end user's name, email address, and location are required.

11. Do I enter a requisition line for shipping or freight?

Yes, shipping and freight should be entered as a requisition line. Use category code "962-86" for freight and identify line as an Amount Only.

12. Do I enter a requisition line for tax?

No, tax will be added to the requisition by the buyer when it is converted into a PO. Make sure budget is available for tax.

13. How can I see if a requisition has been approved?

A confirmation will be emailed to the requestor once the requisition is final and approved. To check the status of a requisition in PeopleSoft, drill down into the Manage Requisitions screen. Enter the Requisition ID or PO ID number and click search. Click the gray triangle to the left of the Req. ID number to expand the details of the requisition. Select the "Approval" icon to track approval routing. The Manage Requisitions screen can be accessed from the Finance Dashboard under Procurement.

14. Does the supplier get a copy of the Purchase Order (PO)?

Yes. All POs are issued (dispatched) via email. All suppliers must have a current email address in PeopleSoft within the supplier database to receive applicable PO.

15. The supplier has not received my Purchase Order, what should I do?

First, check the status in Manage Requisitions to make sure the Purchased Order has been dispatched. If the PO has been dispatched, please contact the supplier to verify the email address. Contact the Purchasing Department and request that the PO be re-sent to the supplier. A valid email address is required in PeopleSoft in order for the PO to be dispatched to the supplier. If the email address is incorrect, please complete a Supplier Intake Form and forward to Business Office for processing.

16. If a supplier gives me an agreement to sign, what should I do?

Any agreements requiring signature should be forwarded to Purchasing and Contract Services. Please be sure to provide an email address for the signed agreement to be returned.

17. Can I create an Amount Only PO (AOPO) for supplies?

No. AOPOs are intended for service renewals, maintenance service agreements, rental services, professional services, and subscriptions/memberships. Exceptions need VPAS approval.

18. How do I check the balance on an Amount Only PO (AOPO)?

To check the balance of an AOPO in PeopleSoft, use the following navigation**:** From **NAVBar Select Navigator>Financials 9.2>Purchasing>Purchase Orders>Review PO Information>Purchase Orders.** Enter Business Unit and PO number to view Encumbrance Balance

19. How do I process a Change Order for a Purchase Order?

All changes to a PO must be initiated by either the requestor or the Business Office at the requisition level. This allows for review and workflow approvals. Once approved and processed, the PO will then be updated and the change order will be dispatched via email to the supplier. Change orders are needed to adjust item pricing, add freight or to increase an Amount Only PO.

20. What happens if the supplier delivers directly to the requestor?

All goods should be delivered to the campus Stockroom. End users should not accept delivery; instead re-route the supplier to the Stockroom so the ordered items can be received into PeopleSoft. End users are **NOT** to receive items in PeopleSoft. If the item(s) ordered are delivered directly to the end user, the stockroom must be notified as soon as possible.

When purchasing items oversized or heavy in nature, include size and weight details on the initial purchase requisition so Purchasing & Contract Services can add special notes for the driver to coordinate delivery with the stockroom and end user.

21. What should the requestor do if they do not receive an item that was purchased?

The requestor should look up the Purchase Order number and contact the supplier to see if the item(s) were shipped. If shipped, the end user should obtain the tracking number. If the item(s) were delivered, the requestor will need to contact the Stockroom to confirm receipt and coordinate delivery. If item was not shipped, request status of delivery from supplier.

22. What is the process for Returns and Exchanges?

Returns and exchanges need to be taken to the stockroom with a copy of the packing slip. The stockroom will contact the supplier. There are several steps that need to be completed in PeopleSoft therefore the end user should not contact the supplier directly regarding the return or exchange.

23. What is a Confirmation PO requisition?

All authorized purchases will have a purchase order issued via PeopleSoft and dispatched to the supplier via email. Purchases made by individuals other than SDCCD Buyers are unauthorized purchases and may result in the individual being financially responsible for that unauthorized purchase or result in the supplier not receiving payment from SDCCD. The District requires regular purchase orders be issued pursuant to the California Education Code prior to the procurement of materials, supplies or services.

If an unauthorized purchase has been made, contact the Business Office for instruction and to request the current form to complete and have signed by Campus VPA. This form details the unauthorized purchase and what steps will be taken to ensure only authorized purchases are made going forward.

24. What if I do not want a check mailed directly to the supplier?

Enter special handling instructions on Line 1 of the requisition. Include name and phone number of contract person and complete the Accounts Payable "Request for Special Handling" form. Email completed form to Robin Watkins at rwatkins@sdccd.edu.