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T. MEAL AND EVENT FORM
A. GENERAL INFORMATION

- The purchasing policies and procedures shown herein are required by the State of Wisconsin Department of Administration, and the University of Wisconsin System. We will do all we can to purchase what you need in a timely manner following these guidelines.

- All monies, whether from student activity fees, lab fees, private gifts or grants, federal and state grants, workshops, clinics, etc., are considered State funds and all purchasing regulations apply.

- No purchase orders will be issued prior to receipt of a requisition by Purchasing. In case of an emergency, authorization may be obtained by calling the Purchasing Office at 342-1221.

- UW-Platteville must aggressively target small, minority, and veteran businesses in its low dollar purchases.

- When a purchase order is processed, those funds are encumbered and can only be used to pay the assigned purchase order. All departments should review their purchase orders in WISDOM on a regular basis to look for purchase orders to close or blanket purchase orders to reduce in order to release those funds for other department expenses. Contact the purchasing department to close or reduce any purchase orders.

B. DIRECT PAYMENTS

A completed purchase requisition and invoice should be submitted to the Purchasing Office for purchases less than $5,000, this includes subscriptions, memberships, registrations, etc.

C. PRINTING

State of Wisconsin Statutes, Chapter 35, establishes competitive bidding as the required method of purchasing printing. All printing done off-campus must be processed through the UW-Platteville Publications Office. You may be personally responsible for the cost of any printing you have done without going through the Publications Office. It is suggested you allow at least three weeks to complete the printing process. Contact the Publications Office at 342-1197 if you have any questions.

D. PURCHASE ORDER PROCESSING

a. REQUISITIONS

- All orders are to be submitted on a YELLOW requisition form. The form is available:
  - on line at the Purchasing Web page
  - as a Microsoft Word or Excel document
  - in paper form
• Call the Purchasing Office if you need the form emailed to you, or if you need a supply of the paper forms. Please remember to print the Purchasing Requisition on yellow paper.

• Requisitions are processed in order of receipt in Purchasing. Please plan ahead and allow us enough time to complete the purchasing process. Most purchase orders are processed the same day as receipt.

• A requisition indicating all funding, quantity, and item description must be submitted prior to the issuance of a purchase order. You also need to provide the vendor name and address, and a current price. To expedite the processing of requisitions please remember that approval must be by the person responsible for the account being charged.

• If the order requires pre-payment you must provide us with the price source and whether shipping is included in the price. We prefer the actual order form, letter, etc. If that is not available, or you received the price quote by phone, please indicate the price and date you received the quote. We must be certain the pricing information is current.

E. LOCAL PURCHASE ORDERS (LPO’s) - Under $500

• Department chairpersons and fiscal agents may issue Local Purchase Orders (LPOs) as they deem necessary and appropriate, for purchases made within the Platteville city limits and totaling less than $500.

• A copy of the local purchase order, and the receipt/invoice from the vendor MUST be sent to Accounts Payable immediately after making such a purchase. Some vendors mail their statements daily.

• The local purchase order must be completely filled out, including the quantity, description, unit price, and total. We require an itemized bill from the vendor, and we must also have an itemized LPO in order to make payment.

• Keep in mind that Local Purchase Orders may not exceed $500. You may NOT issue two local purchase orders in one day, to the same vendor, in order to go over the $500 limit. It is the responsibility of the department to enforce this rule; the vendor is not necessarily going to refuse a sale of $500 or more.

• If you need to spend more than $500, please, submit a completed requisition to the Purchasing office in advance. If you need something in a hurry, you may fax a requisition to our office and we will assign it a confirming number immediately.

• Local Purchase Orders are to be used ONLY when you go to a business and pick up an item. Anything that has to be ordered by the store should be processed on a regular requisition. Local purchase orders are a one-time-use order. They can not be used one day for one item, and then held until the second item comes in.
• Do not use an LPO for food (store or restaurant purchases) printing, advertising, computer components, or other items that may have restrictions. Please call the purchasing office if you have any questions about using LPOs.

F. LOW-DOLLAR/BEST JUDGEMENT PURCHASES - $5000 or less

• The dollar limit for best judgement purchases is $5000. The dollar amount applies to the total of the purchase order, not individual line items. It is your responsibility to use your best judgement and obtain products or services from a vendor that will give you the lowest price.

• The purchasing office reserves the right to change the vendor on any purchase requisition in order to adhere to State of Wisconsin rules and regulations. There are products and services on State contracts that we are required to use, including but not limited to: copy machines, computers and printers, all office supplies, and many other items.

• The Purchasing Card is the most efficient and preferred method of obtaining goods and services up to $5,000.00.

G. SIMPLIFIED BIDDING - $5000 - $50,000

• Procurement procedures established by the State of Wisconsin, Department of Administration, require that all purchasing transactions of $5000 or more be competitively bid or price comparisons made prior to issuing a purchase order. You can usually buy more with the dollars you are budgeted if you go through the bidding process. Vendors just might sharpen their pencils when they know we are obtaining competitive quotes.

• Any item on a Wisconsin Department of Administration contract, UW System contract, or UW-Madison contract can be purchased without going through the bidding process. There is no limit to the dollar amount. Contact the Purchasing Office for more information on bulletins or contracts.

• Departments are authorized to obtain price quotations for purchases totaling $5000 - $50,000. However, the purchasing office reserves the right to solicit additional quotes as required by State policy.

  • If you elect to solicit your own bids, you must include with your requisition the pricing information from all bidders. Three quotes are required, however you may solicit more if you wish. You may use catalogs, price lists, phone quotes, the Internet, etc., to obtain your price quotes.

  • If at least three price quotes are not provided with the requisition, the item(s) may be sent out for written bids by the Purchasing Office.

  • The low bid must be submitted in writing, on the bidder’s letterhead or other business form. A FAX quotation is acceptable. The written quote MUST be attached to the requisition.
• A form to use for simplified bidding is available at:  
   http://www.uwplatt.edu/business/purchasing/forms/simplified_bid.pdf

• The Purchasing office will obtain written quotes for you if you wish. You need 
   to submit a requisition outlining the item to be purchased and include detailed 
   specifications so we can solicit quotations for you. Brand name products must 
   be bid on an **as-equal** basis. Please provide us with a bid list if you can.

H. **OFFICIAL SEALED BIDS - $50,000 and higher (Commodities)**

   The Purchasing Office must solicit official sealed bids when the total cost of any 
   purchase order equals or exceeds $50,000 or more, and the product or service is not 
   available on a contract.

   • You will need to provide to Purchasing generic specifications in Microsoft 
     Word format. The bid cover and body of the bid specifications must not 
     reference a brand name or trade name of the product to be purchased.

   • The bid will be awarded to the lowest bidder meeting all specifications. If a 
     vendor submits the low bid, but does not meet all specifications we can not 
     award to that bidder. Once a bid is open all information is available to the 
     public.

   • The bid notice will be published in the official state newspaper for two weeks, 
     and the entire bid will be made available to State of Wisconsin VendorNet 
     subscribers via the Internet.

   • As a result of the bidding process, the specified brand may not be purchased, 
     or may be purchased from a vendor other than the one indicated on the 
     requisition.

I. **PROJECT ORDERS**

   Any purchase using project funds must be submitted on a special blue *Project Order 
   Requisition*. Please contact Peter Davis at 342-1155 for more information regarding 
   project orders.

J. **BLANKET ORDERS**

   • Blanket orders are issued for your convenience to purchase miscellaneous supply 
     items. They are not intended for the purchase of commodities or services that should be 
     secured through the bidding process.

   • Each department is responsible for monitoring the dollar amount left open on a blanket 
     order. If a blanket order is completely used up and you continue to use that number it is 
     considered an unauthorized purchase. When your blanket order starts to get low contact 
     the Purchasing Office so the order can be increased.
- A blanket order is an encumbrance against your budget. If you plan to spend only $150 for the entire year, do NOT request a blanket order for $1000. You will have tied up $850 you could have been using during the year. All blanket orders are canceled June 30th of each year. You must submit requests for new blanket orders every July 1st.

K. SOLE SOURCE

- Any sole source request $5000 - $24,999.99 must be justified in writing at the time you send the requisition to Purchasing. Simply stating that a vendor, product, or service is sole source is not sufficient reason and will not qualify as a 'sole source' purchase. Specifications supporting the product or service as unique are required use the sole source form available at http://www.uwplatt.edu/business/purchasing/forms/sole_source.pdf.

- A sole source request for $25,000 or more requires prior approval from the State of Wisconsin, Department of Administration.

L. ADVERTISING PROCEDURES

Please keep in mind that all purchasing policies and procedures apply to advertising. For ads costing less than $5,000.00 use best judgment. Ads between $5,000 and $50,000 require three quotes when competition exists or a sole source document filled out when there isn't sufficient competition. Advertising over $50,000 requires a sealed bid process or a Governor’s waiver from DOA when a sole source is required.

M. OFFICE SUPPLIES

- Go to UW Madison –MDS Website.
- Click on - Been Here
- Under GUEST ACCOUNT click here
- Enter campus log in information
- Click on Staple link
- Enter item in SEARCH
- Fill out the Central Stores Requisition Form (available from Cathy Hastings at Central Stores) with the items you selected and send the form (keep all copies together) to Cathy.
- When the supplies arrived sign the form and send the white copy back to Cathy and keep the pink copy.

You may not purchase office machines, furniture, or other non-supply items. If you have any questions please call the purchasing office.

N. FURNITURE & SIGNAGE

The university is required to purchase furniture and signage from the Wisconsin Prison’s Industry, Badger State Industries (BSI). Items available through BSI include, but are not limited to: seating, desks, folding tables, computer workstations, and file cabinets. Item available from BSI can be viewed at their website, via a link on UW-Platteville’s Purchasing website. Other furniture needs can be addressed by using UW System and UW Madison
contracts. Please contact the purchasing office for more information about buying furniture items.

O. COMPUTER HARDWARE AND SOFTWARE

All purchase requisitions for computer hardware and software must be routed through the campus Office of Information Technology (OIT). There are many state contracts that we use to buy computer products and OIT can provide that information along with technical advice. Please call the OIT office at 342-1421 if you have questions concerning purchasing computer products. Any cloud based software acquisitions whether payment is required or not must have a Cloud Services Checklist signed by OIT before agreeing to any of the vendor’s Terms and Conditions. The checklist is available at: http://www.uwplatt.edu/business/forms.html

P. UNAUTHORIZED PURCHASES

- An invoice over $5,000 presented without a purchase order is considered an unauthorized purchase. If you are responsible for such a purchase you need to complete a form justifying the purchase. State auditors require the completed form before the invoice can be paid.

- We can NOT process a purchase order after-the-fact. If you need to call in an order, please contact the purchasing office and we will give you a confirming purchase order number.

- DO NOT purchase any product or service without following the proper purchasing procedures. You could be held personally responsible for the bill.

Q. EMERGENCY REPAIRS

Please call the purchasing office when you need something repaired on an emergency basis. We will ask for your account (department/org) code, name of the company fixing the item, a brief description of the item being repaired, and an estimated dollar amount.

R. PRIZES GIFTS AND AWARDS TO INDIVIDUALS

When purchasing prizes, gifts and awards use the Explanation of Prizes, Awards or Gifts Form available at: http://www.uwplatt.edu/business/forms.html.

You can not buy food for a birthday or going-away party with State funds.

S. PURCHASING (CREDIT) CARD

The Purchasing Card is the most efficient and preferred method of obtaining goods and services up to $5,000.00. A purchasing card is available to UW-Platteville employees for official business purchases. More information is available by following the Purchasing Card link on the Purchasing homepage.

T. PURCHASING FOOD FOR EVENTS
When providing food for an event use the Events-Meal Payment form to follow the correct procedures. The form is available at: http://www.uwplatt.edu/business/forms.html