

Standards for Purchasing Goods and Services

STN-U5348.01C

Authority

[POL-U5438.01](#) Purchasing Goods and Services Policy

Ethical Purchasing

All purchases must comply with the [Standards for Ethical Purchasing](#) (STN-U5348.01B)

Controlled and Prohibited Purchases

Regardless of the purchase method, the [Standards for Controlled and Prohibited Purchases](#) (STN-U5348.01B) must be followed.

Controlled purchases are specific goods or services that require some form of approval prior to making the purchase and/or have a required purchasing method.

Required Purchasing Methods based on Transaction Amount

If the transaction amount is less than \$10,000:

Priority Method:	Western Marketplace
Alternative Method 1:	One Card (see below)
Alternative Method 2:	Purchase Order
Alternative Method 3:	Check Request
Alternative Method 4:	Reimbursement

If the transaction amount is \$10,000 to \$99,999:

Informal Competition is required where three written quotes are required to be obtained prior to the purchase and maintained on file if the purchase is made by:

- Paper Purchase Order
- Non-Catalog purchase through Western Marketplace,
- OneCard, or
- Check Request

No quotes are required if the purchase is made through a Western Marketplace catalog order.

If the transaction amount is over \$100,000:

Formal competition is required where a written solicitation (Request for Proposal – RFP) with a minimum of three separate bids facilitated by the Purchasing Department and Contract Administration.

OneCard Purchasing Limits

Individual transactions: No single card transaction may exceed \$3,000 without approval from Purchasing Department. Exception: To request approval for OneCard purchases over \$3,000, send an email request to the University Card Administrator including merchant name, description of the purchase, and dollar amount of the item.

Daily Purchasing Limits: OneCard transactions are limited to 10 transactions per day or \$10,000 in total purchases per day whichever occurs first.

Monthly Purchasing limit: The total monthly spend for a single OneCard is limited to \$10,000 per month.

Exceptions to daily and monthly limits, require written approval from the Financial Manager and Chief Procurement Officer.

Approval for Payments**Western Marketplace Purchases:**

Approval queues are established within the Marketplace system. Receivers of goods and services must acknowledge receipt of goods and services in the Marketplace system in order for the payment to be submitted to the vendor.

OneCard Purchases:

Approval routing queues are established within the Payment.net system. Receivers of goods and services must ensure receipt of goods or services and to follow up with the vendor if goods are not received in a timely manner. Cardholders who do not receive goods purchases must promptly inform the Budget Authority and the University Card Administrator.

PO/Check Requests:

1. If the vendor allows for credit card payments, the department should pay with a OneCard.
2. If not paying with a OneCard, all invoices are to be mailed to PO Box 218, Bellingham, WA 98225-0218. Departments are not to have invoices mailed to directly to them.

After receiving an invoice, Accounts Payable:

- Will send the department a payment confirmation letter one week before payment is made if the invoice total is less than \$3,000. If the department is aware of an issue where payment should not be made, the department is to immediately contact Accounts Payable per the confirmation letter.
- Will send a payment approval letter requesting signature approval by the budget authority or financial manager when an invoice is \$3,000 or more. Payment will not be made until a signature is received.

Regardless of payment method, all departments should monitor their encumbrances and liquidate remaining balances via the [Encumbrance Liquidation/Closure Request](#) e-sign form.