Procurement Tips and Reminders

TRAVEL

- If you have charged a registration fee or airfare to your travel card, send the receipt to travel@potsdam.edu as the charge will hit the JP Morgan statement prior to your trip and receipt of your travel voucher.

- Personal vehicle mileage reimbursement rate increased to $.70 effective 1/1/25.

- The gsa.gov site for checking per diem rates is a federal site and we do not follow their meal per diem breakdowns. We have a separate link on our site to break down the food per diem rates (dinner/breakfast only - no lunch, snacks or adjustments for first/last day of travel).

- Always ask for the state hotel per diem rates and submit any hotel over the max forms in advance.

- We are tax exempt so bring your tax-exempt form to the hotel, receipts must be itemized, submit travel requisition 30 days in advance, submit vouchers within 5 days of return of your trip.

PCARD

- When submitting your Pcard certification paperwork, don't forget to write the Jaggaer requisition number on your paperwork.

JAGGAER

- Non-Catalog vs. Non-Encumbered Payment Form

Non-catalog orders should be used when the goods/services have not yet been received, you have a quote, and in most cases, you want a purchase order to be sent to the vendor. If the item is through a PunchOut supplier (WB Mason, Dell, Intivity, etc.), this method should not be used in most circumstances, and you should place the order directly through the PunchOut in Jaggaer. The only exception is if you have a lower quoted price from the vendor and receive prior approval from Procurement Services.

A Non-Encumbered Payment Form should only be used when the goods/services have already been received, or pre-payment is required in certain limited circumstances. A purchase order will not be sent to the vendor. An invoice is required to enter a non-encumbered payment form.

Please note, Pcard (credit card) orders must _always_ be entered on a non-catalog requisition even if they meet the criteria described above for a non-encumbered payment form. Please note in the Comments/Business Purpose section that you are requesting this to be paid on Pcard. If the vendor is not listed in Jaggaer <u>AND</u> it will be paid by Pcard, please enter under the supplier "Potsdam-Miscellaneous Supplier". For any other orders other than Pcard where the vendor is not listed in Jaggaer, please see the process below.

- For new vendors that are not in Jaggaer/the state system, a W-9 form must be attached to Requisition and entered under the supplier "New Supplier" along with contact information (name, e-mail address, and phone number) for someone who has authority to make legal and financial decisions on behalf of company. Also, include an e-mail address to send POs to (if different from the contact above). If the payee is an individual and not a business (SSN listed on W-9 instead of EIN), please upload to our secure link: https://webspace.potsdam.edu/Procurement_Drop_Box.

- There is a new widget on the My Department Orders Dashboard called My Department Standing Orders. It will list all the standing orders for your department for the current fiscal year. It also will tell you how much has been paid against the standing order so far this year under Voucher Total compared to the Total Amount that was entered.

- It is strongly encouraged to enter a cart name for your requisitions. It should be a short description of the purchase that will help identify it.

- You can track the progress of your pending requisitions and where they are in the approval process. On the My Department Orders Dashboard, there is a widget for My Pending Department Requisitions by Date. When you click on a requisition, look on the Workflow under the What's next? section on the right. If you click on the current step name, it will tell you who needs to approve it and you can see the future approvals it needs to receive before it is completed.

CONTRACTS
- Contracts may only be signed by authorized officials whose signatures have been filed with the Office of the State Comptroller. Therefore, all purchases must be first approved by Procurement Services prior to a contract being executed.
- To have your contract reviewed, submit a non-catalog purchase requisition in Jaggaer. If there are not any funds to encumber, enter 0.00.