Questions from Fiscal Year-End Deadlines Training on November 10, 2022

1. Considering the short supply in paper, are there any plans to reduce our paper consumption by moving towards digital records management, rather than continuing to require hard copies for all fiscal documentation and requests?

   Answer: We encourage all departments to submit all supporting documents for purchase requisitions (PRs) electronically via email to their designated buyer. Departments are also encouraged to maintain electronic versions of documents instead of hard copy, this aligns with the Sustainability Resources Committee goal of minimizing the need to print documents.

2. I believe the new personal computers (PCs) will be all-in-one meaning the central processing unit (CPU) is part of the monitor.

   Answer: All computers are built to order and will ship to end users when the complete configuration of the computer is ready.

3. Can Purchasing Services let departments know before deleting purchase requisitions (PRs) that are missing documentation?

   Answer: Purchasing Services will communicate with the department when a PR is incomplete or missing documentation to coordinate removal from Colleague (Datatel).

4. To reduce duplicate efforts, wouldn't W-9's and Certificates of Insurance be better held in a central location (Purchasing) rather than each department or site?

   Answer: Purchasing Services is responsible for retaining records of all W-9 forms and Certificates of Insurance per Board Policy and Administrative Regulation 3310 – Records Retention and Destruction. Departments do not need to keep a record of these documents.

5. For budget changes, is there a list somewhere on the Fiscal Services site, that will let departments know what General Ledger (GL) accounts are permitted to be drawn from and placed in within the same budget?

   Answer: We would recommend visiting the Fiscal Services webpage page for more information (click here). We encourage you to contact your Administrative Services Office prior to initiating a budget change form to ensure appropriate movement of funds.

6. Who decides what GL account are appropriate for a purchase? If the budget office does not know the correct account?

   Answer: Departments are encouraged to communicate with their respective Administrative Services department. For fund 12 projects, departments are also encouraged to communicate with Resource Development for assistance.

7. I am new to the purchasing process, is there a checklist of the different compliances that departments need to follow?

   Answer: Purchasing Services has a number of resources available on the intranet page to provide support and guidance to all departments. Information on purchasing policies and procedures can be found in the Purchasing Services Handbook (click here). Guidelines and requirements for purchase types and dollar amounts can be found on the Dollar Amount Limitations for Procurement resource (click here). Training videos covering general purchasing processes are also available on the intranet page. Still have questions, communicate with your Administrative Services department for general funds and include Resource Development for special project assistance.

8. If possible, can departments get more information on Voluntary Product Accessibility Templates (VPATs)? I understand what a VPAT is. My question is, is the VPAT per product or a form?

   Answer: The VPATs and Accessible Technology Training PowerPoint is available on the Purchasing Services intranet page under the Trainings section (click here). If you have additional questions related to VPATs, please forward your questions to Information Technology Services (ITS) by creating an ITS helpdesk ticket (click here).