

A stylized, light blue line-art illustration of a water tower with a lattice tower and a domed top, positioned on the right side of the slide.

UCDAVIS

Supply Chain
Management

Pandemic Purchasing...One Year Later!

April 28, 2021; Updated June 18, 2021

Today's Presenter

- Jim Hewlett, Communications and Training Developer, Supply Chain Management; more than 25 years with the university
- Jim thanks the other Subject Matter Experts he works closely with, including:
 - Mike Morgan; Strategic Sourcing and Procurement
 - Steven Kobayashi; Procurement and Contracting Services
 - Mike Kuhner and Mary Jackson; Accounts Payable/Travel
 - Matt Czarnowski and Ryan Ott; AggieBuy
 - Reina Dela Cruz; FIS Help Desk



Notes on Today's Presentation

- This is an update of a pre-recorded presentation first given in September 2020.
- Like the previous presentation, we'll discuss purchasing practices for the Davis campus, School of Medicine (including at the UC Davis Medical Center), and Agriculture and Natural Resources (ANR).
- We are also incorporating answers to the questions you included at the time you registered...and there will be time for Q&A at the end, too.
- Hospital Departments (Chart H Accounts) purchasing practices will **not** be covered in this training; questions should be directed to <https://health.ucdavis.edu/supplychain/purchasing/index.html> .



We Are Here To Assist You!

- Our Procurement and Contracting Services team and buyers continue to work with our university-contracted suppliers to ensure that your purchasing needs are met during these challenging times.
- This presentation is designed to empower you with resources and information to process purchase requests in the easiest way possible.



Purchasing Policies and Rules Still Apply

- Although many staff are working from home or elsewhere remotely, purchasing policies still apply.
- Purchases must continue to support teaching, research, public service, or patient care.
- Complete list of policies is online at <https://supplychain.ucdavis.edu/procure-contract/policies> .



Policies and Rules Still Apply

- Appropriate approvals must always be secured BEFORE purchases are made.
- Out-of-pocket reimbursements are generally not acceptable; see the Emergency Purchasing guidelines at <https://supplychain.ucdavis.edu/procure-contract/guidelines/emergency-orders> if an item needs to be received quickly.
- Additional rules and guidelines, such as for federally-funded purchases, continue to apply.



Working from Home Considerations

- Purchases (or reimbursement requests) of personal items used at home, including (but not limited to) coffee/meals, paper products, and cleaning products, are NOT allowed.
- Working from Home is not considered “travel status;” any reimbursement claims generally associated with travel are NOT acceptable and will not be processed/approved.
- See the information page at <https://supplychain.ucdavis.edu/temporary-remote-work-reimbursement-guidelines> .



Working from Home: Internet/Phone Expenses

- Employees may request reimbursement for internet or cellular services, if, and only if: employee does not already have high speed internet or cellular service available at their home, the service is required to perform UC business, AND is approved by the department head.
- No reimbursement shall be made for business calls, or the percentage of business use of internet or cellular service, if such use is within the existing internet or calling plan contract.
- See Business and Finance Bulletin G-46 at <https://policy.ucop.edu/doc/3420357/BFB-G-46>.



Working from Home: Office Supplies/Equipment

- New purchase or reimbursement, is allowable **only if** university-issued office equipment can't be taken home, or the employee does not already have personal equipment at home to enable them to perform their work duties.
- **Employee Agreement for Use of University Resources form** must be completed and signed by employee using equipment at home and department head. This form (available at <https://supplychain.ucdavis.edu/temporary-remote-work-reimbursement-guidelines#office-supplies>) helps department keep track of university equipment/supplies being used at employee homes/other off-campus locations.



Working from Home: Office Supplies/Equipment

- If you have specialty equipment, such as an ergonomic chair, or other items at the office, work with your department to make arrangements for access to take those items to your home office location, as necessary.



Purchase For Your Current Needs

- The supply chain for many items is still in recovery. Worldwide demand for PPE and Medical supplies continues to be a challenge for many, including researchers.
- Plan ahead, order early, and order small quantities on a regular basis. Establish standing orders as needed.
- Work closely with sales reps for impacted items. Be prepared to accept alternative equivalent products.



Purchase For Your Current Needs

- As needed, contact the supplier rep with the PO number, and ask for a status update if an order is delayed. You may also ask for a back order report from the supplier to monitor on a regular basis.
- We understand that these are challenging times, but refraining from excessive purchasing helps us to keep the supply chain working as efficiently and effectively as possible in meeting the needs of the entire campus.



Some Purchasing Practices May Be Different

- Some departments may have more (or fewer) staff processing purchasing requests.
- Deliveries may be made to home addresses or other locations due to closed department offices.
- More communication is likely required amongst departmental staff, due to many working remotely.



AggieBuy is Still Your Go-To Purchasing Source!

- Current functionality in AggieBuy (<https://aggiebuy.ucdavis.edu>) allows departmental purchasers to add residential delivery addresses for purchases without going through a central approval process.
 - This functionality will be removed at a later time, once most staff have returned to physically working on campus.
- See more information at <https://supplychain.ucdavis.edu/procure-contract/aggiebuy/adding-home-address> .



AggieBuy is Still Your Go-To Purchasing Source!

- AggieBuy includes the on-campus **AggieSupply** storehouses, which feature Personal Protective Equipment (PPE) and other items that can protect departmental staff who must physically report to work on campus and/or interface with students and/or the public.



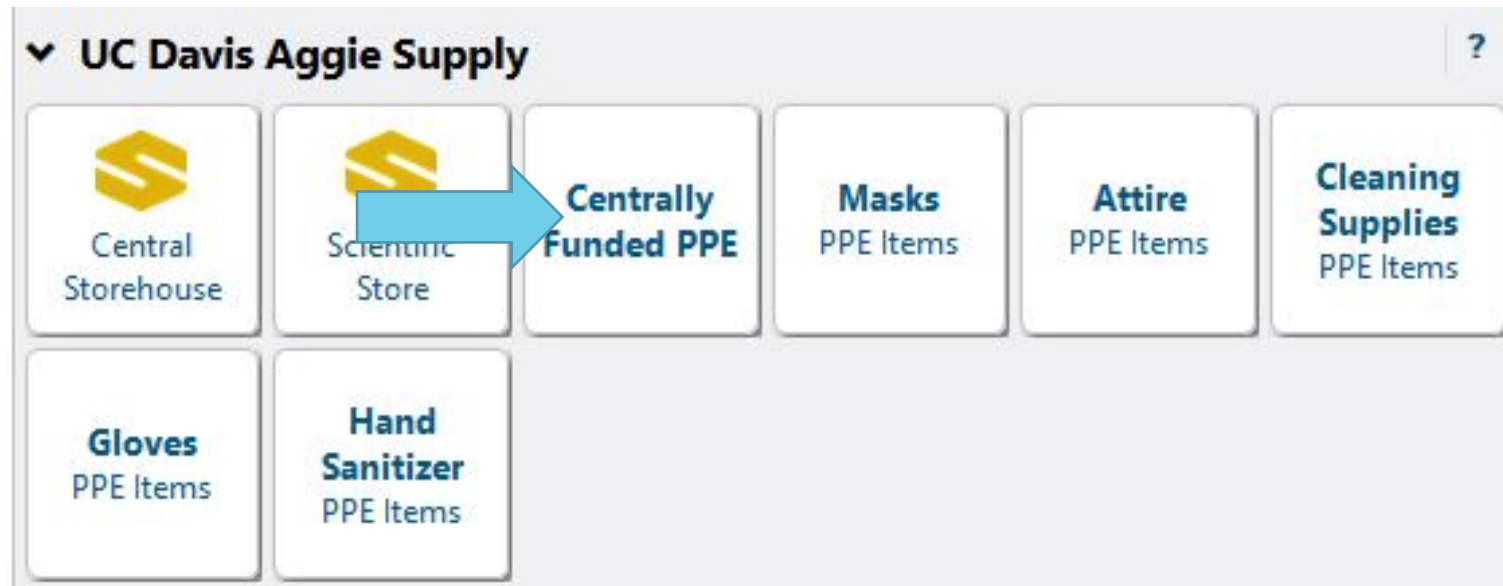
PPE Registration Form Temporarily Suspended

- Throughout much of the past year, Supply Chain Management has required that departments complete a PPE Registration Form and update it every two weeks in order to help identify overall campus PPE needs. Thank you to everyone who assisted in this important effort!
- In the past few months, demand for PPE and the supply of goods have stabilized to the point where we have temporarily suspended use of the PPE Registration Form.
- However, it is very likely as we approach the Fall Quarter and the expected return to campus, that Supply Chain Management may need to replace that form with another form or system for determining PPE demand. This will be communicated if it becomes necessary.



PPE Central Funding Program Ends 6/30/21

- PPE items in AggieBuy available through the **AggieSupply Centrally Funded PPE** tile are available at NO COST to departments. These are for COVID-related protection. *NOTE: This program will end after 6/30/21.*
- On the AggieBuy Main Dashboard, in the Showcases area, under the **AggieSupply** section, click on the **Centrally Funded PPE** tile.



Centrally-Funded PPE Program: Ends 6/30/21

- These items should be purchased separately from other items in AggieBuy.
- When checking out the cart in AggieBuy, enter account **3-PPECOVD** and project **COVID19** to ensure appropriate approval routing.
- Items available in this no cost program include gloves, hand and surface sanitizers, and face coverings.
- The PPE in this no cost program is for office use only, and not to be used for home, laboratory, or UC Davis Health use.
- School of Medicine (SOM) Clinicians providing patient care should obtain PPE from the hospital, and not through this program.



No Cost PPE Orders: Program Ends 6/30/21

- Available items in the catalog regularly fluctuate, but our team does its best to maintain inventory as much as possible.
- Occasionally, high-demand items are temporarily removed from the Centrally-Funded PPE section, but can be purchased from our storerooms.
- Orders take approximately 3 business days to fulfill.
- Campus orders are available for pick-up at 615 Hopkins Road; Hopkins Services Complex is on the west campus (west of Highway 113).
- Orders at UCDMC in Sacramento (for office use, not hospital or patient care) are delivered by the Mail Services unit.



Additional PPE Options Available in AggieBuy

- Other AggieBuy catalogs contain PPE items, but the purchases from these catalogs are **not** available at no cost and will be charged to your departmental accounts as usual:
 - **Bio Rad**
 - **Fastenal**
 - **Fisher Scientific**
 - **Genesee**
 - **Grainger**
 - **Medline**
 - **Millipore Sigma**
 - **Neta Scientific**
 - **Office Depot**
 - **Spectrum**
 - **VWR**



Many PPE Not Subject to CA Sales Tax

- Due to the pandemic, CA Governor Gavin Newsom issued an executive order on April 7, 2020, making many PPE items temporarily tax-exempt from CA sales tax.
- Accounts Payable is working with the CA Department of Tax and Fee Administration to recoup any taxes on PPE that should not have been paid on AggieBuy orders.
- Acquiring PPE through the Centrally-Funded Program is the best option. Nothing is charged to your department.
- There is **nothing you need to do** for AggieBuy or Quali Financial System (KFS) PPE orders to adjust the taxes.



Signage is Another Need Besides PPE

- Laminated Signage providing visual cues for minimizing exposure for your employees and customers is available at NO Cost from Repro Graphics.
- Learn more and order the signage from the [Repro Graphics website](#).
- You can also download pre-printed COVID signage from the [Campus Ready website](#).



Plastic Barriers are Another Need

- Multiple options are available from the **Grainger** catalog in AggieBuy.
- Some options are also available from the **AggieSupply MRO** Store catalog in AggieBuy.
- These stiff plastic dividers can sit on desks or countertops to help prevent the spread of airborne germs, and are especially helpful when interacting with students/customers/general public.



What about N95 Respirator Coverings?

- N95 Respirator Coverings are available for purchase from the **AggieSupply Central Storehouse** catalog in AggieBuy. Training and fitting documentation is required.
- These respirators are **not** available through the Centrally-Funded PPE option in AggieBuy.
- The available respirator inventory is primarily for those essential workers who must work outside during poor air quality (e.g., caused by wildfires), as well as health workers and first responders.
- These respirators should not be purchased for office use; the face coverings available as part of the **Centrally Funded PPE** should be ordered instead.



Procurement Card Can Still Be Used

- Important for cardholder to secure approval before making a purchase, especially in today's remote work environment.
- As always, purchases on the Procurement Card should ONLY be made when the requested item(s) is not available in AggieBuy.
- Before using the Procurement Card, ensure that your purchase is compatible with the [allowable uses for the Procurement Card](#).



Kuali Financial System (KFS) Can Still Be Used

- AggieBuy and the Procurement Card should be used in lieu of KFS when possible.
- KFS purchases require significantly more administrative overhead and extensive data entry, and are appropriate when a purchase type (such as for controlled substances or most services) is not allowable in AggieBuy or on the Procurement Card.



Don't Forget KFS Attachments!

- Many KFS Requisitions and Purchase Agreements require one or more of the following attachments:
 - Price Quotes
 - Independent Contractor (Individual) Pre-Hire Information Form
 - Source Selection & Price Reasonableness Justification Form and Individual Disclosure Statement
 - Grant Related documentation
- Completing and attaching the appropriate documentation will expedite the approval and Purchase Order creation process.
- This information is also available at <https://supplychain.ucdavis.edu/procure-contract/buying-srvcs/srvc-orders#attachments>.



Using Project Code COVID19/Additional Required Documentation

- The Project Code **COVID19** should be entered for any purchases that normally would not have occurred, had it not been for the current pandemic. A brief statement of how the expense is relevant to COVID19 should be entered in the Quali document **Explanation** field, or in the **Business Purpose** section of the AggieBuy requisition.
- For Procurement Card transactions, the COVID19 Project Code should be entered when performing transaction reconciliation on the Procurement Card document in KFS.
- More info is at <https://financeandbusiness.ucdavis.edu/coronavirus-financial-reporting>.



Considerations for Returning to Campus

- The **Campus Ready** web page at <https://campusready.ucdavis.edu/> addresses many of the concerns discussed in today's session, as well as others that may apply to your specific situation.
- If your department staff are returning to campus after working remotely, complete the **Mail Services Return to Campus** online form at <https://supplychain.ucdavis.edu/form/return-to-campus>, so that mail service will resume for your department (mail is being held at Mail Services for will-call for closed departments).



Time for Q&A



Online Resources

- COVID-19 Information page: <https://supplychain.ucdavis.edu/coronavirus-covid-19-information-and-resources>
- Campus Ready website: <https://campusready.ucdavis.edu/>
- Purchasing Policies: <https://supplychain.ucdavis.edu/procure-contract/policies>
- AggieBuy Help: <https://supplychain.ucdavis.edu/procure-contract/aggiebuy>
- Procurement Card Help: <https://supplychain.ucdavis.edu/pay-purchase/p-card>
- KFS Purchasing Document Help: <https://financeandbusiness.ucdavis.edu/systems/kuali/docs/purchasing>



Thanks for your Time. Be and Stay Safe!

