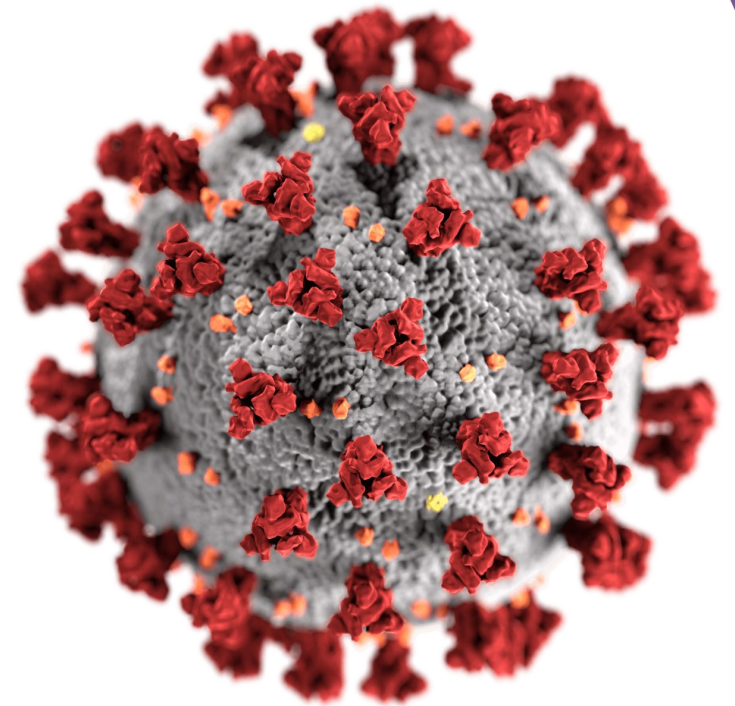# Pandemic Purchasing

Purchasing Best Practices in the COVID19 Era

September 2020

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
  - Steven Kobayashi; Procurement and Contracting Services
  - Mike Kuhner and Mary Jackson; Accounts Payable/Travel
  - Ryan Ott and Matt Czarnowski; AggieBuy
  - Reina Dela Cruz; FIS Help Desk

This is a Pre-Recorded Presentation

- Information is current as of Friday 9/25/20.

- We have incorporated many questions from the campus community into this presentation and hope you find it helpful. If you have additional questions after viewing the presentation and visiting the website resources provided, please email SCMcomms@ucdavis.edu.
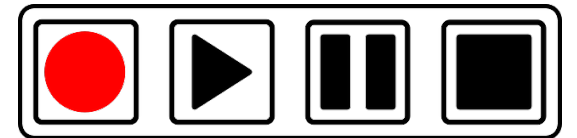
Note on Today's Presentation

- This training will discuss purchasing practices for the Davis campus, School of Medicine (including at the UC Davis Medical Center), and ANR

- Hospital Departments (Chart H) 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 are working with our university-contracted suppliers to ensure that your purchasing needs are met during these challenging times.

- This training is designed to empower you with resources and information to process purchase requests in the easiest way possible.

Here to help

UCDAVIS | SUPPLY CHAIN

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 still 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.

UCDAVIS | SUPPLY CHAIN

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 .
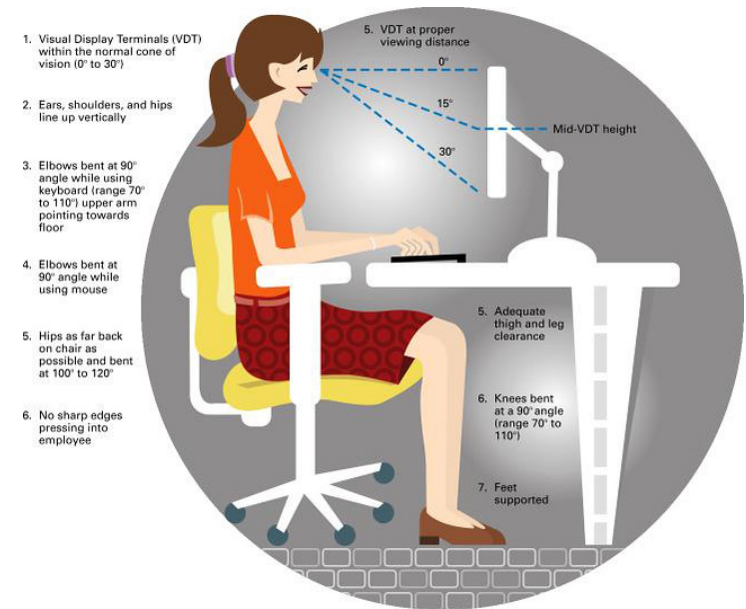
UCDAVIS | SUPPLY CHAIN

Working from Home: Office Supplies/Equipment

- New purchase or reimbursement, is only allowable 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 helps department keep track of university equipment/supplies being used at employee homes/other off-campus locations.
  - The form is available at https://supplychain.ucdavis.edu/temporary-remote-work-reimbursement-guidelines#office-supplies.

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.

1. Visual Display Terminals (VDT) within the normal cone of vision (0° to 30°)

2. Ears, shoulders, and hips line up vertically

3. Elbows bent at 90° angle while using keyboard (range 70° to 110°) upper arm pointing towards floor

4. Elbows bent at 90° angle while using mouse

5. Hips as far back on chair as possible and bent at 100° to 120°

6. No sharp edges pressing into employee

5. VDT at proper viewing distance

0°
15°
30°
Mid-VDT height

5. Adequate thigh and leg clearance

6. Knees bent at a 90° angle (range 70° to 110°)

7. Feet supported

UC DAVIS | SUPPLY CHAIN

Purchase For Your Current Needs

- In order to ensure that each department can purchase what they need, limit your purchases to your **current** business needs.

- 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.

UCDAVIS | SUPPLY CHAIN

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.
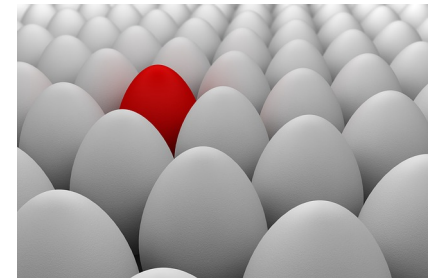
AggieBuy is Still Your Go-To Purchasing Source!

- Updated functionality in AggieBuy (aggiebuy.ucdavis.edu) allows departmental purchasers to easily 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

UCDAVIS | SUPPLY CHAIN

…But 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 Process

- Due to the ever-evolving nature of the current situation, we cannot guarantee availability of items, but a PPE Registration Form helps Supply Chain Management to best plan and allocate for ongoing and future needs.

- PPE requests require the biweekly completion of an online [registration form](). **The online form should be completed by the departmental staff member overseeing the acquisition of PPE for the department.**

- The form is ONLY used to identify the need for PPE, **not** the actual requests. PPE requests are to be made in AggieBuy, as will be discussed next.

PPE is Available for No Cost to Departments

- PPE items *through the AggieBuy **AggieSupply Centrally Funded PPE** tile catalog* are available at NO COST to departments. These are for COVID-related protection.

  - On the AggieBuy Main Dashboard, in the **Showcases** area, under the **AggieSupply** section, click on the **Centrally Funded PPE** tile.

PPE is Available for No Cost to Departments

- These items should be purchased **on a separate order** 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.

- SOM Clinicians providing patient care should obtain PPE from the hospital and not through this program.

Additional Notes on No Cost PPE Orders

- These 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 Kuali Financial System (KFS) PPE orders to adjust the taxes.

    - If a Procurement Card is used to purchase PPE, work with the supplier to ensure that the tax is not charged. P-Card transactions are more challenging to adjust "after the fact."

UCDAVIS | SUPPLY CHAIN

Other PPE Option: Creating Disinfectants

- Supply Chain Management has established partnerships with a variety of suppliers to ensure a steady supply of PPE. However, if a desired disinfectant becomes unavailable, online instructions can help laboratory staff create their own solutions.

- These instructions should ONLY be used by laboratory staff who are experienced in working with various chemicals and solutions.

Signage is Another Need Besides PPE

- Laminated Signage providing visual cues for minimizing exposure for your employees and customers are [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](#).

UCDAVIS | SUPPLY CHAIN

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**.

- 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.
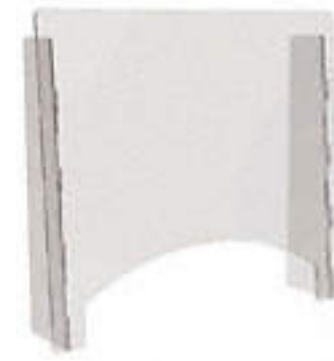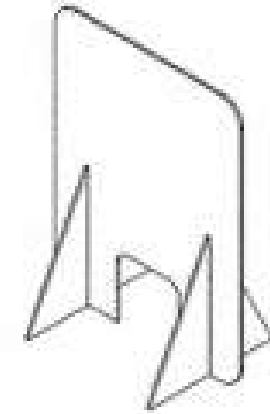
What about N95 Respirator Coverings?

- 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 purchased 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.
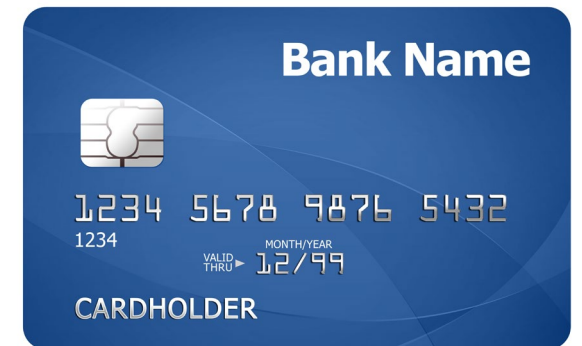
Kuali Financial System (KFS) Can Still Be Used

- 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

Having 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.

Enter Project Code COVID19

- The Project Code **COVID19** should be entered on a transaction that is related to COVID19 purchases: https://financeandbusiness.ucdavis.edu/coronavirus-financial-reporting

- Any purchases that normally would not have occurred had it not been for the current pandemic should include the **COVID19** Project Code in the **Accounting Line** section of AggieBuy or KFS

- For Procurement Card transactions, the COVID19 Project Code should be entered when performing transaction reconciliation on the **Procurement Card document** in KFS.

- When purchasing items for COVID19 purposes, a brief statement of how the expense is relevant to COVID19 should be entered in the Kuali document explanation field, or in the comments section of the AggieBuy requisition.

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).*

Online Resources

- **No Cost PPE Purchases:** https://supplychain.ucdavis.edu/news/covid-19-ppe-made-available-through-central-funding

- **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!