

UCDAVIS

Finance and Business

Registering and Doing Business With UC Davis

February 25, 2021



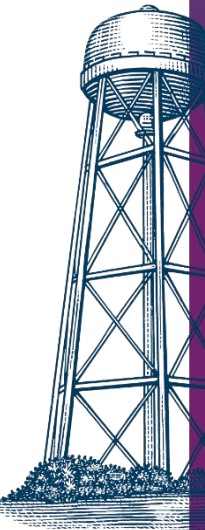
Today's Presenters

- Mike Morgan is the Procurement Director in Supply Chain Management at UC Davis.
- Justin Sullivan is the Executive Director of the UC Strategic Sourcing Centers of Excellence
- Mike and Justin have each managed the negotiation and implementation of many university purchasing agreements over the years.



Doing Business with UC Davis

- This presentation provides an overview of the supplier registration process, as well as how UC Davis processes purchase orders and payments to suppliers.
- Please note that supplier registration does not guarantee future business opportunities with UC Davis, but can expedite any future business transactions.
- We look forward to working with you!



CalUSource Registration is the First Step!

- If you haven't done business with the University of California before, visit the CalUSource website first at <http://calusource.net/login/>, to register your business.
- On the CalUSource site, click on the **For Suppliers** header, and select **How to Do Business With Us**.



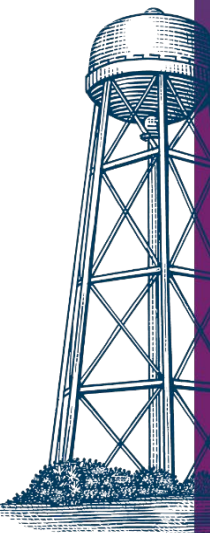
FOR STAFF ▾

FOR SUPPLIERS ▾

PUBLIC BID SITE

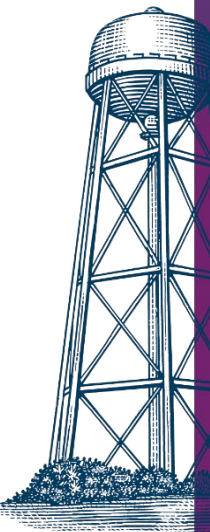
SUPPORT ▾

PLATFORM LOGIN



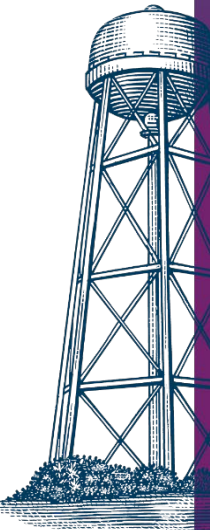
CalUSource Registration is the First Step!

- The process of registering with CalUSource creates a supplier record for your business with the University of California, but not UC Davis specifically. We'll discuss that process next.
- The CalUSource registration process gives you access to see public bid opportunities for each of the UC campuses.
- We'll discuss those bid opportunities in more detail later!



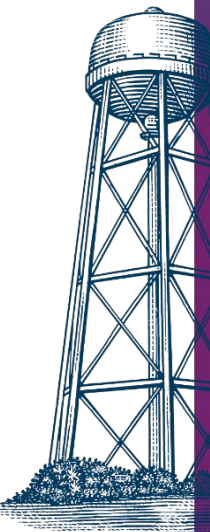
Registering with UC Davis is the Second Step!

- Certified Small and Diverse Businesses should register on the UC Davis website at <https://supplychain.ucdavis.edu/form/uc-davis-supplier-registration>.
 - This form is restricted to those suppliers that are certified small or diverse businesses.
 - Completing this form assists UC Davis buyers when searching for a certified small or diverse business in the future.
 - Completing this form also assists UC Davis in expediting future purchasing transactions, since it records much of the required information for those transactions.



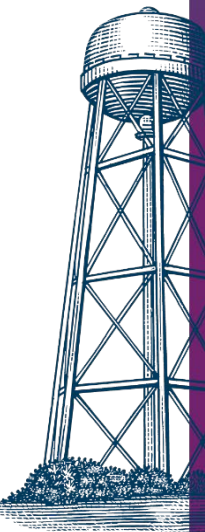
How to Become a Certified Small Business

- State of California certification program – it's self-certification, and suppliers are required to provide specific documents.
 - <https://caleprocure.ca.gov/pages/sbdvbe-index.aspx>
 - <https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Certify-or-Re-apply-as-Small-Business-Disabled-Veteran-Business-Enterprise>
- United States Federal government small business certification information, and supporting documentation is also required.
 - <https://certify.sba.gov/>



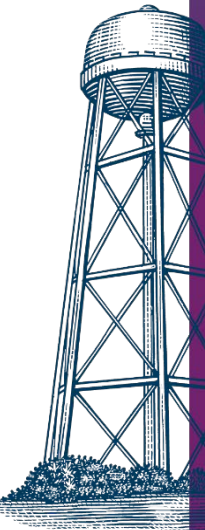
Certification Can Increase Possibilities

- Getting certified will give your business preferred status for government contracts and give you access to more contract opportunities.
- The Federal Government is the largest buyer of products and services in the U.S.
 - The Small Business Administration has a variety of programs to help small businesses compete for these federal contracts.



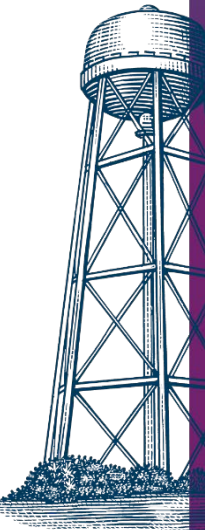
Locating UC Public Bid Opportunities

- Public bid opportunities can be found on the CalUSource platform.
 - <https://smart.gep.com/publicRFx/ucal?oloc=215#/>
- Bid opportunities are listed for each of the UC campuses.
- Let's look at some of the current opportunities, and how suppliers can respond to them.



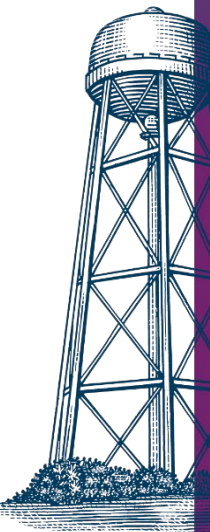
Purchasing Methods at UC Davis

- Suppliers should not make sales to the university without an official UC Davis Purchase Order (PO) or UC Davis Procurement Card.
- UC Davis Campus PO numbers begin with the prefix UCD and six numbers (e.g., UCD814795) or four-digit alpha/numeric department code and six numbers (e.g., APOM623780).
- UC Davis Medical Center PO numbers:
 - Operational POs: 10 digits, begin with 108, 106, or 101
 - Capital POs: 10 digits, begin with 4444
 - Service Contract POs: 8 digits, begin with 9000



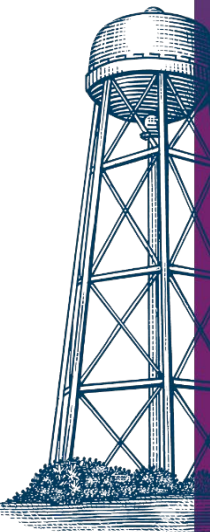
Beware of Fraudulent Purchasing Attempts

- Emails purporting to be from Tim Maguire, UC Davis Chief Procurement Officer, or UC Davis buyers, are currently being reported by suppliers.
- These emails usually contain typos and other grammatical errors.
- Unsure of the legitimacy of an email or Purchase Order? Contact UC Davis campus Procurement and Contracting Services at (530) 752-0370 or UC Davis Medical Center Purchasing at (916) 734-2475 **BEFORE** fulfilling the order.



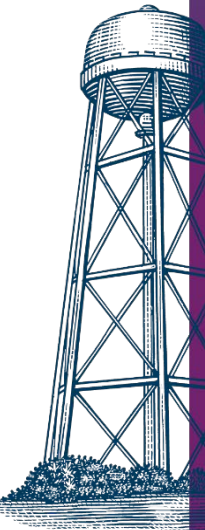
Successful Invoicing

- Campus suppliers are encouraged to use the electronic invoicing platform, Transcepta. Register at: connect.transcepta.com/ucdavis. This platform ensures that suppliers have provided all the information necessary for processing an invoice.
- UC Davis Health suppliers should send invoices to hs-ucdhsap@ucdavis.edu
- Supplier Invoices should always include:
 - Complete Description of Goods or Services Furnished
 - UC Davis Purchase Order Number
 - Quantities
 - Unit Prices, Total Price, Payment Terms



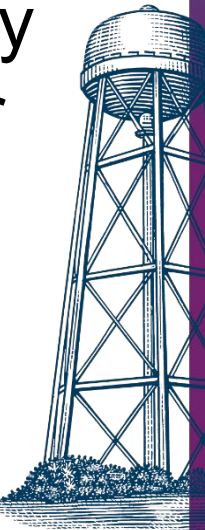
Payment Methods

- Credit card payment through US Bank's Payment Plus program is UC Davis' preferred payment method. NET terms – the UC will disburse payment immediately upon invoice approval.
- PayMode-X: Electronic settlement network that offers faster, more efficient electronic payments and comprehensive remittance advice.
- Other Methods:
 - ACH/EFT payment with 2/10 NET 30 terms
 - ACH/EFT payment with NET 45 terms
 - Paper check with NET 60 terms (least preferable)



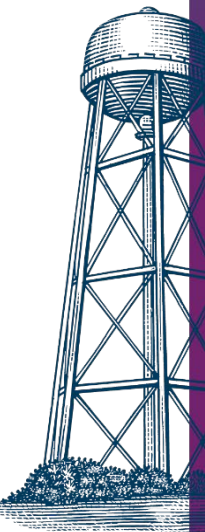
Ensuring a Successful Relationship

- Keep us supplied with latest catalogs and price lists in electronic format.
- Keep us informed of situations that may delay order fulfillment (e.g., back order situations, plant closures, impending shortages or strikes).
- Do not offer gifts or gratuities that may influence or affect university purchasing decisions. Incentives should take the form of quality or price considerations.
- Promptly provide us with an accurate certificate of insurance and proof of workers' compensation whenever requested.



Supplier Web Resources

- Visit the UC Davis Supply Chain Management website at <https://supplychain.ucdavis.edu/> and click on the **Suppliers** header for UC Davis campus information.
- Information for the UC Davis Health campus in Sacramento is available at <https://health.ucdavis.edu/supplychain/vendorsguide.html> .
- Additional details on working with the UC system are available at <https://www.ucop.edu/procurement-services/for-suppliers/index.html> .



Thank You!

- We appreciate your interest in doing business with UC Davis and look forward to working with you in the future!

