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.
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.
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!
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://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](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/](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.

- 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/vendorguide.html.

- Additional details on working with the UC system are available at https://www.ucop.edu/procurement-services/for-suppliers/index.html.
We appreciate your interest in doing business with UC Davis and look forward to working with you in the future!