PURCHASING METHODS

UCLA provides several options to purchase goods/services from vendors and has vendor agreements in place. When in doubt on which method to use, please email beorders@hsseas.ucla.edu and one of the department staff will advise you.

PURCHASE ORDER (PO) – PREFERRED METHOD

The PO is the preferred method for purchasing. Please submit the Purchase Order Request form along with any quotes to beorders@hsseas.ucla.edu for processing.

Once the order has been created, staff will email you a copy of the requisition in a PDF format.

Setting up a new vendor

If the vendor is not set up in the UCLA purchasing system and you will be working with the vendor on a regular basis, we can set them up as a preferred vendor.

If the vendor is willing to become a preferred UCLA vendor and agrees to payment terms, please submit a PO request form to beorders@hsseas.ucla.edu with the vendor's information (name, email, and phone number). BEOrders creates a requisition where the AP team sends a PaymentWorks email invitation to the vendor.

Once the vendor receives the PaymentWorks invitation, the vendor will register via PaymentWorks. On average, this step takes vendors more than 17 days to complete and submit, making it one of the main causes of onboarding delays.

After the vendor information is routed to the UCLA Vendor Management team for review and approval.

Vendor Management will then assign the vendor an ID/number (i.e., Vendor Control Key [VCK]).

UCLA Samueli Bioengineering

UCLA Department of Bioengineering- Purchasing Policies and Procedures

For Federally-funded purchases ≥$10,000 and non-Federally-funded purchases ≥$100,000

The requestor should complete the Selection & Price Reasonable (SSPR) to substantiate the appropriateness of the source selection and price reasonableness. This Form is subject to verification by the delegated procurement/supply chain manager at your UC location. Several key requirements like source selection, competition, price reasonableness, use of small businesses, and conflicts of interest must be addressed appropriately.

SSPR Instructions:
https://ucla.box.com/shared/static/5pvhv241aobvhrk3gsho0qiw48toc81b.pdf

SSPR FAQs: https://ucla.box.com/shared/static/n1n2z0s6mwiji5th80po4f67sf0u09pz.pdf

SSPR Form: https://ucla.box.com/shared/static/stkajpzh238b2tk14zgc9pim7nvbs0v2.pdf

- **Vendor Quotes** – Provide price or rate quotes from three (3) qualified sources (including your selected supplier).
- **Third Party Risk Management Form**: Anyone at UCLA who needs to use a new third-party product or service that (A) accesses, creates, receives, maintains, and/or transmits UC data; (B) processes credit card transactions on behalf of UC; and/or (C) accesses any UC system(s) must initiate the TPRM Assessment Process on behalf of the vendor.

Technologies (Software):

Technologies includes:

- Networked Devices or Equipment that are connected to the UCLA environment.
- Software, including on-prem, Software as a Service (SAAS).
- Services where vendors have access to Personally Identifiable Information (PII), Patient Health Information (PHI), UC Institutional Information, and/or UCLA network and systems.
- Copyright or Software Royalty.

Before initiating a requisition for software, it is essential to obtain approval from **Third-Party Risk Management (TPRM)**. This approval must be completed before submitting a PO request. To avoid delays in the requisition process, ensure that the TPRM approval is finalized prior to submission. Additionally, note that each new transaction requires a separate TPRM assessment.

TPRM Instructions: https://www.ociso.ucla.edu/tprm-create- complete-and-review-triage

Updated September 2024

Software Purchases MUST be obtained via the established UCLA agreements:

- Software Central: https://softwarecentral.ucla.edu/
- University Agreements: https://procurement.ucop.edu/systemwide-contracts/information-technology-strategic-sourcing
- If your specific request is unavailable, please work with your IT department and purchasing (via requisition) to ensure the established procedures are followed.
  https://purchasing.ucla.edu/purchasing/purchasing-goods/purchasing-software
  https://purchasing.ucla.edu/purchasing/purchasing-goods/custom-software

Services

Before any services can be performed on UCLA premises, an approved Purchase Order (PO) and a Certificate of Insurance (COI) **are required**. The requestor is responsible for obtaining the COI from the vendor. If the COI is not provided, the Accounts Payable (AP) team will reject the requisition/PO. Without a PO, UCLA Purchasing cannot verify if the vendor has a COI on file, which could pose a liability risk to UCLA if an incident occurs while the vendor is conducting business on-site without proper insurance.

To reinforce this commitment, the UC Board of Regents approved *Regents Policy 5402* in November 2019, which generally prohibits contracting for services and ensures equitable treatment for any allowable contract workers.

A "covered service" is work customarily performed by SX (service) and EX (patient care technical) bargaining unit employees at the university. This can include but is not limited to:

- *Cleaning, custodial, janitorial, or housekeeping services*
- *Food services*
- *Laundry services*
- *Groundskeeping*
- *Building maintenance*
- *Transportation and parking services*
- *Security services*
- *Billing and coding services*
- *Sterile processing*
- *Hospital or nursing assistant services*
- *Medical imaging or other medical technician services*

https://purchasing.ucla.edu/purchasing/campus-purchasing/outsourcing-covered-services

Receiving services without an approved PO can result in the vendor not being paid by the University and the person who made the order could be personally liable for the order. Services should never be paid for by university employees out of pocket.

A UCLA professional buyer's signature is required on all contracts and licenses, including service and maintenance not covered by established agreements.

Note: Do not sign vendor contracts and agreements. UCLA Purchasing has the sole responsibility and authority to do so.

CANCELLATION OF A PO

If a Purchase Order (PO) needs to be canceled, please notify BEOrders so a ticket can be submitted to release the encumbrance on the Principal Investigator's (PI) fund. Simply canceling the order directly with the vendor can create a discrepancy on the Financial Report, as the PO will still be considered open with an active encumbrance.

UCLA Samueli Bioengineering

UCLA Department of Bioengineering- Purchasing Policies and Procedures

DEPARTMENT PROCUREMENT CARD (Pcard)

The department procurement card should only be used if a vendor does not accept POs or is not set up as a vendor in the UCLA BruinBuy system. The PCard will ONLY be used for urgent purchases or for one-time purchases from vendors you will not use again in the future. Please submit a Purchase Order form and send it to beorders@hsseas.ucla.edu to place the order via PCard. The single purchase limit is $2,500.

Note: PCard cannot be used to pay foreign vendors.

Common Procurement Card (Pcard) Purchases & Restrictions

The Pcard can be used to obtain a wide range of products for your department. The card may be used like a low-value order (LVO) or petty cash to purchase items or services.

The Pcard cannot be used for goods or services in excess of program limits or the individual card's purchase limit, whichever is less. Some common products and services cannot be purchased using the Pcard because of funding or policy restrictions.

The following items **cannot** be purchased on the Pcard:

- DSL or other internet connection charges or services (these charges should be paid by the employee and reimbursed, if appropriate).
- Cash advances.
- Internet or online payment mechanisms that do not identify the ultimate payee.
- Inventorial equipment (priced at $5,000 or more).
- Firearms, ammunition, explosives, radioactive or other hazardous materials.
- Ethyl alcohol (except denatured), narcotics, dangerous drugs or other controlled substances.
- Precious metals.
- Items for personal or ornamental use.
- Travel or entertainment (meals, airfare, hotel, car rental, catering, meeting refreshments, gifts).
- Vehicle/gasoline or diesel fuel or real estate rentals/leases.
- Goods or services from an employee or near relative of an employee of the University.
- On-site construction.
- Consulting or contract employee services (these require a specific UCLA contract).
- Medical or insurance services.
- Services, repairs or maintenance for which the merchant performs the services on the premises or where there is an established Strategic Sourcing Agreement or catalog in BruinBuy.
- Any other purchase for which a supplier requires a signed contract.
- Other items specified in University policy BUS-43, UCLA Policy 740 and Procedure 740.

UCLA Department of Bioengineering- Purchasing Policies and Procedures

PERSONAL FUNDS- REIMBURSEMENT REQUEST

This method should be the last resort if you cannot use PO or PCard for payment. Use of employees' personal funds and reimbursements for procurement of goods and services is discouraged. Reimbursements for non-travel, non-entertainment and non-communication related expenses are exceptions to our normal procurement methods, and subsequently may take longer to process.

Refer to the Section V Restriction of UCLA Policy 740 for additional information.

With the release of this new LVO Policy 741, a $1,000 limit has been established for reimbursements for purchases other than travel, entertainment, conference registrations, tuition reimbursement, journal publication fees and maintaining professional credentials.

To request a non-travel reimbursement, please submit the following documents to beorders@hsseas.ucla.edu:

- **Reimbursement Request Form**
- **Receipts**
- **Proof of payment** - If receipt does not show the last four digits of credit card number, please provide redacted credit card or bank statements.

If a reimbursement request is submitted **60 days** after purchase date, a business justification is required to explain the delay. The Accounts Payable (A/P) team will review these submissions on a case-by-case basis. Reimbursements **older than 364 days** cannot be processed through Concur and will require exceptional approval from executive leadership. Additionally, if the reimbursement request is submitted more than six months after the end of the trip or event, the reimbursement will be treated as imputed income and taxable, with income imputed on the employee's W-2.

Not all out-of-pocket purchases are eligible for reimbursement. Review this page for a list of common restrictions.

- All service-oriented transactions (e.g., repairs/maintenance services, advertisements, photography/videography services, etc.):
    - Services, including software, publication fees, and memberships, provided by a foreign vendor
    - Services, repairs, or maintenance for which the merchant performs the services on the premises or where there is an established Strategic Sourcing Agreement or catalog in BruinBuy
    - Consulting or contract employee services (these require a specific UCLA contract)

- Software/Apps/Web Hosting & IT Purchases are unallowable on personal funds.

- Any other purchase for which a supplier requires a signed contract
- Cellphones & accessories on personal accounts)
- Coffee-making equipment (e.g., Keurig Single-Serve Coffee Maker)
- Refrigerator/microwave for personal office
- General snacks, coffee, and/or beverage condiments for staff
- Donations and sponsorships
- Drone equipment (must be purchased using a requisition)
- Ethyl alcohol (except denatured), narcotics, dangerous drugs, or other controlled substances
- Firearms, ammunition, explosives, radioactive, or other hazardous materials
- Framed certificates and prints for personal office
- Goods or services from an employee or near relative of an employee of the University
- Home-office furniture
- Inventorial equipment (priced at $5,000 or more)
- Items for personal or ornamental use
- Late fees and finance charge fees
- Medical or insurance services
- On-site construction
- Parking citations
- UCLA facility parking fee for employees
- Personal or social memberships (e.g., UCLA Faculty Center)
- Postage and stamps
- Precious metals
- Real estate rentals/leases
- Venue or meeting space reservations
- Other items specified in University policy BUS-43, UCLA Policy 740, UCLA Policy 741, Attachment A, and Attachment B

https://purchasing.ucla.edu/accounts-payable/non-te-reimbursements/restrictions

VENDOR CATALOGS

The list of vendors who have agreements and contract pricing with UCLA can be found at: https://purchasing.ucla.edu/strategic-sourcing/contracts

Hosted Catalog Vendors: list of goods from a variety of suppliers that allows you to compare prices.

Punchout Vendors: The PunchOut catalog directly links Bruinbuy Plus and all vendors by allowing them to order directly with suppliers.

Non-catalog Vendors: items are manually entered when the item is not found in either Hosted and Punchout catalog.

The vendors below also have a contract with UCLA. Department staff can find contracted pricing via the BruinBuy Plus system.

AUDIO VISUAL EQUIPMENT:

- **BH Photo Video Pro Audio:** https://www.bhphotovideo.com/

COMPUTERS & PERIPHERAL PRODUCTS

- **DELL**: https://www.dell.com/premier/us/en/rc964329/#/systems/std-configs/
- **CDW:** https://www.cdw.com/
- **ASUCLA:** https://www.asucla.ucla.edu/

FURNITURE

- **Steelcase/Tangram:** https://www.tangraminteriors.com/

LABORATORY EQUIPMENT & SUPPLIES

- **Abcam**: https://www.abcam.com/index.html
- **Airgas:** https://www.airgas.com/
- **Bio-Rad:** https://www.bio-rad.com/
- **Cell Signaling Technologies:** https://www.cellsignal.com/

- **Eppendorf:** https://www.eppendorf.com/us-en/
- **Fisher Scientific**: https://punchout.fishersci.com/us/en/home.html
- **Genesee Scientific:** https://geneseesci.com/
- **Integrated DNA Technologies (IDT):** https://www.idtdna.com/page
- **MilliporeSigma:** https://www.sigmaaldrich.com
- **New England Biolabs:** https://www.neb.com/en-us
- **Neta Scientific:** https://www.netascientific.com
- **Promega:** https://www.promega.com/
- **Qiagen:** https://www.qiagen.com/us
- **Quartzy:** https://www.quartzy.com
- **Rainin Pipetting 360:** https://www.shoprainin.com
- **Spectrum:** https://www.spectrumchemical.com/
- **Life Technologies (ThermoFisher scientific):** https://www.thermofisher.com/us/en/home/order.html
- **Thomas Scientific:** https://ariba.thomassci.com/
- **Thorlabs:** https://www.thorlabs.com/
- **VWR:** https://us.vwr.com/store/account/welcomePage.jsp

MRO PRODUCTS

- **Fastenal:** https://www.fastenal.com/
- **Grainger:** https://www.grainger.com/
- **McMaster- Carr:** https://www.mcmaster.com
- **HD Supply:** https://www.suppliersolutions.com/hds/default.asp

OFFICE SUPPLIES

- **Amazon:** https://www.amazon.com/
- **Dedicated Corporate Solutions (Office Depot):** https://ucla.app.box.com/s/cgejx1rix9r7bi2702halry7ztrlbyar

- **Ricoh:** https://www.ricoh-usa.com/en

JANITORIAL SUPPLIES

- **Waxie Sanitary Supply:** https://info.waxie.com/

MEDICAL SUPPLIES

- **McKesson Med Supplies:** https://www.mckesson.com/
- **Medline:** https://www.medline.com/

PROMOTIONAL PRODUCTS

- **Gorilla Marketing:** https://www.gorillamarketing.net/