



UNIVERSITY *of* NORTH CAROLINA AT
WILMINGTON

Guide to

Procurement

of

Goods and Services

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About Purchasing Services and this Guide

Purchasing Services is responsible for all purchasing contracts entered into for the University. We are here to guide you through the purchasing process for all your department's purchasing needs whether it is everyday office supplies, equipment, or services. This guide is intended to assist in the understanding of the University's procurement process and how Purchasing Services can assist you and your department in obtaining the goods and services needed to operate and carry out the mission of UNCW. It does not reflect all policies or procedures required for purchasing but will provide an overview of all the functions of Purchasing Services including the purchasing methods, basic purchasing processes, and procurement using the PCard program. Do not hesitate to give us a call when you need assistance.

Useful Links Referenced

- **Finance Training Program Registration and Calendar:**
<https://itsappserv02.uncw.edu/training/login.aspx?ReturnUrl=%2ftraining%2f>
- **Licensing and Trademarks:** <https://uncw.edu/licensing/logos.html>
- **PCard Webpage:** <https://uncw.edu/purchasing/purchasingcard.html>.
- **State Term Contracts:** <https://ncadmin.nc.gov/government-agencies/procurement/statewide-term-contracts>
- **uShop Webpage:** <https://uncw.edu/purchasing/ushop.html>
- **uShop Quick Reference Guide:**
<https://uncw.edu/purchasing/documents/ushopuserguidev13.2.pdf><https://uncw.edu/purchasing/documents/ushopuserguidev13.2.pdf>
- **Vendor debarment check (NC):** <https://ncadmin.nc.gov/documents/nc-debarred-vendors>
- **Vendor debarment check (USA):** <https://sam.gov/content/exclusions>
<https://www.sam.gov/SAM/pages/public/searchRecords/search.jsf>
- **Independent Contractor Webpage:** <https://uncw.edu/purchasing/independentcontractorhome.html>
- **General Counsel's "Contracts" Webpage:** <https://uncw.edu/generalcounsel/ltcontracts.html>

Purchasing Responsibility

As a State-supported institution, UNCW must follow the regulations and purchasing policies set forth by the state of North Carolina. The Division of Purchase and Contract, a division of North Carolina's Department of Administration, has the responsibility for administering the State's program for the acquisition of property and services where public or grant funds are involved. For most expenditures under \$500,000, the University is the delegated purchasing authority. Purchasing Services has the responsibility for administering the purchasing program on behalf of the University while adhering to the policies set forth by the North Carolina Department of Administration, Division of Purchase and Contract (<http://www.pandc.nc.gov/Default.aspx>) and in accordance with the laws of the State of North Carolina.

Outside Charge Accounts

In accordance with the above exclusive responsibility, the following applies to Outside Charge Accounts:

No department or individual employee of UNCW is authorized to open or allowed to establish any type of charge account that obligates University funds or obtain any type of credit card for purchasing goods or services without prior approval by Purchasing Services.

Approval may be requested from the Director of Purchasing Services, specifying the type of account being sought, a justification and business need, and the funding source. Any requests utilizing Foundation funds require approval by the Vice Chancellor for Business Affairs in addition to Purchasing Services.

Purchasing Services reserves the right to deny any outside charge account as deemed in the best interest of the University and in accordance with State guidelines.

Basic Purchasing Principles

Purchasing Authority

UNCW Purchasing Services has the exclusive responsibility for making all purchase contracts entered into for the University (exception being rental or purchase of real property). This authority covers all supplies, materials, printing, equipment, and services.

Ethical Standards -General

State and University policies prohibit the Purchasing Office from entering into any purchase agreements for personal purchases on behalf of employees. All goods and services purchased remain the property of the State until consumed or disposed of by public sale through Surplus Property procedures. This is regardless of funding source.

NC General Statute 133-32 addresses the legal implications of State employees accepting gifts or favors from vendors. Briefly summarized, this statute states that it is unlawful for any vendor who has a current contract with a governmental agency, has performed under such a contract within the past year, or anticipates bidding on such a contract in the future, to give gifts and favors to any employee of a governmental agency who is charged with preparing plans, specifications, or estimates for public contract. It is unlawful for a State employee to willfully receive or accept such gifts or favors. For additional information, see Executive Order No. 24 regarding "Gift Bans" at:

<https://files.nc.gov/ncdoa/documents/ExecutiveOrder24GiftBan.pdf>

Ethical Standards – Prohibited Communications

When competition is received during the bid solicitation phase of an acquisition, the requesting department will normally participate in the evaluation process. After requests for quotes/bids have been posted or issued by Purchasing Services and prior to the award of a purchase order or contract, possession of bid/quote information is limited to University and State evaluating personnel only. Any communication with bidding vendors that may be necessary for the purpose of clarification of a quote or bid must be cleared in advance through Purchasing Services.

Ethical Standards – Avoiding Conflict of Interest

Conflict of interest relates to situations in which financial or other personal considerations may compromise, may involve the potential for compromising, or may have the appearance of compromising an employee's objectivity in meeting University duties or responsibilities, including research activities. The bias that such conflicts may impart can affect many University duties, including decisions about personnel, the purchase of equipment and other supplies, the collection, analysis and interpretation of data, the sharing of research results, the choice of research protocols, the use of statistical methods, and the mentoring and judgment of student work. An employee may have a conflict of interest when he or she, or any member of that person's immediate family, has a personal interest in an activity that may affect decision making with respect to University teaching, research, or administration.

A conflict of interest may be an actual or perceived interest by a UNCW employee in an action that results in, or has the appearance of resulting in, personal, organizational, or professional gain. A conflict of interest occurs when an employee has a direct or fiduciary interest in another relationship.

Conflicts from Related Parties

In order to avoid potential conflict of interest, the University's policy is that if a University employee has an immediate family member (spouse/partner, mother, father, son, daughter, brother, sister, mother-in-law, father-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law) who is a principal owner of a business, the department in which that family member is employed will not be allowed to do business with that firm.

Essential Exceptions

If, however, it is essential for a department to purchase materials or services from a University employee's immediate family member or their company, a request should be submitted in writing to the Director of Purchasing Services explaining the nature of the need and the business justification for not seeking services from other suppliers and will be sent to the State Procurement Officer (SPO) for review and approval.

Conflicts from Employees

North Carolina Administrative Code and University policy prohibit purchases from University employees or companies in which any University employee has any ownership stake.

Receiving of Goods

Departments have the responsibility to inspect all materials, supplies, and equipment immediately upon receipt. If any items are missing, damaged, or do not perform to the standards agreed upon, contact Purchasing Services immediately and enter a comment on the Purchase Order in uShop to note the issue.

Only when materials, supplies, and equipment are received in satisfactory condition should departments complete the receiving documentation in uShop. Completing the receiving documentation in uShop without physically receiving and inspecting all items for satisfaction is a violation of NC purchasing regulations and UNCW policy. It is extremely important for departments to receive the goods in uShop promptly upon delivery (no more than two business days). It is also important that vendors send the invoice directly to Accounts Payable and not to the departments. This will allow Accounts Payable to pay bills promptly. If a department receives an invoice, send it immediately (no more than two business days) to accountspayable@uncw.edu and instruct the vendor to send any future invoices to Accounts Payable.

Scams

UNCW faculty and staff should be aware of an on-going problem with unauthorized supplier representatives using questionable business tactics to market "special promotions", "limited time offers", etc. for copier toner, office supplies, maintenance items, etc. These telemarketers attempt to scam the University by convincing faculty and staff to order or approve shipments of goods based on the misperception that they are a University approved supplier. These supplies are usually of inferior quality and priced significantly higher than fair market value from University approved suppliers. Some of their questionable business tactics include:

- Phone calls about renewal orders never placed
- Invoices for goods never shipped
- A deadline for special promotion or sales
- Pre-authorization for a future shipment
- Phone calls to send FREE samples of toner
- Bogus email order confirmations
- Fictitious invoices for services or items never requested or received

To help the University community stay on guard against these telemarketing suppliers, Purchasing Services has found some useful tips to help faculty and staff avoid being swindled.

How to Avoid Scams

Faculty and staff should take the following steps to avoid falling victim to the supplier's scams:

- Watch out for fake "invoices" that do not reference a UNCW purchase order number or that were not generated by an official PCard purchase.
- Watch out for telemarketers that call you directly with "limited time offers." Do not order from a supplier calling you!
- Order your supplies from state contract suppliers.
- Never give out your PCard information to unknown suppliers.
- Report any problems directly to Purchasing Services.

What to Do if You Become a Victim of a Scam

1. Receiving calls from individuals claiming to be representatives from toner companies:

- They will usually ask for your copier model and serial # or they may know it and ask you to verify it. Say, "I'm not authorized to accept your products" and hang up. Never give

them any information or verify any information.

2. Receiving unsolicited toner, other items, or invoices for services or items never requested:

- If possible, get as much information off the label and refuse the box from the delivery service. Then call Purchasing Services.
- If you end up signing for the items, DO NOT OPEN. Contact Purchasing Services with as much information as possible (company, address, etc.) and to receive further instruction.
- Forward all documentation to Purchasing Services.

Please communicate these guidelines to your faculty, staff, and student employees. If you have any questions or concerns, please contact Purchasing Services at purchasing@uncw.edu.

Purchasing Methods

There are a number of different purchasing methods which can be used for acquiring goods and services.

Purchasing Card / UNCW PCard

Procurement Cards are issued to permanent UNCW faculty or staff and are to be used only by the named cardholder. The purchasing card is essentially a corporate VISA card for business use only that allows rapid purchase of low dollar goods. Liability rests with the University instead of the individual cardholder. Individuals with approval by their Dean or Department Head may apply for a card and are required to attend a PCard training session prior to card being issued and to sign a card use agreement. All state purchasing rules and regulations and University policies apply to PCard transactions. For more information please visit: <https://uncw.edu/purchasing/purchasingcard.html>.

Purchase Requisition (uShop)

uShop is the purchasing system for UNCW and completion of an afternoon training session (PUR206 "uShop Shopper/Requestor") is required before a user can be granted access to uShop. Training dates and registration is available via the [Finance Training Program](#).

Users login to uShop for creating, tracking and/or approving requisitions through MySeaport. The uShop system makes the process of purchasing quick and convenient through its browser-based screens. Online catalog shopping, placing requisition requests, purchase order tracking, order history and other features help departments keep track of their spending. Online approvals and electronic distribution of purchase orders to vendors reduces processing time and paperwork and provides a cost savings to the University.

Requisitions are routed through uShop's workflow to Purchasing Services to request goods and services. Requisitions require departmental and divisional approval in accord with established workflow. Based on the requisition's account code(s), fund(s), dollar amount, commodity and other factors, the workflow may route the requisition to additional approvers, such as Grant Officers or IT, for their approval. Once the requisition reaches the Buyer Queue step, Purchasing Services will issue a purchase order for requisitions that are \$25,000 and less or on State Term Contract. If the total order is over \$25,000 and not on an existing contract, generally bids or proposals are solicited, and a new contract is awarded.

Please refer to the *How-To* sections and *Understanding Bids* elsewhere in this guide for details.

Note: The purchase order shall be fully approved by Purchasing Services prior to any commitment being made to the vendor, or before services are performed, or goods be requested or delivered.

Gas Card Program

Purchasing Services orders the cards and distributes the monthly invoices for departmental review and approval for the Wex program, a commercial gasoline credit card program for the purchase of gasoline, diesel, or other designated motor fuels and oil. WEX is UNCW's authorized gas card provider.

The WEX gas credit card is for official use only for use with state-owned vehicles including Motor Fleet and other University-owned vehicles. The cards are assigned to a specific vehicle and not for use with any other. They are never to be used for personal vehicles even if the traveler is on official UNCW business.

As a rule, the gas cards are not to be used when the necessary services are available from State or University-operated facilities. Gasoline and diesel should be obtained from the University service pumps whenever possible. The WEX gas card is an alternative when the UNCW gas pumps are inaccessible, low on fuel, or in cases of campus emergencies. The gas cards can be used for fuel and fluids only and are recognized and accepted at most major gas stations.

When purchasing fuel and/or fluids with the WEX gas card obtain a priced, itemized receipt at the time of purchase. Purchasing Services will forward a copy of the monthly statement to departments that have purchased fuel and invoices are processed through uShop. Departments are responsible for matching the receipts to the statement and for verifying their charges.

To obtain a WEX gas card, please send an email to purchasing@uncw.edu with the following information:

1. Department name, cardholder name, departmental coordinator's name
2. License plate number, make and model of the State-owned vehicle to which the card will be assigned

If your card is lost or stolen, report it immediately to WEX at 1-800-492-0669 and PCard@uncw.edu. Any fraudulent charges made to the card are the responsibility of the department until WEX has been notified.

Any questions about this process should be directed to Purchasing Services

Expediting the Purchasing Process

After you have checked on-campus resources for immediate availability of the supplies and services needed, there are some things you can do to expedite the purchasing process for many of your routine needs and some extraordinary steps which can be taken for emergency or pressing needs.

Be aware other departments might be stakeholders on your procurement and may need to approve the purchase prior to a commitment being made with the vendor. For example, purchases that may cause health and safety issues, require modifications to buildings, etc. will need to be reviewed by the appropriate departments. Technology purchases vendors who only accept payment via credit cards, vendors who process credit card transactions (PCI), licensing or transfer of intellectual property, programs that will bring foreign nationals to campus, or payments to foreign vendors are other examples of procurements requiring campus stakeholder approval.

Plan Ahead – Start Early

We encourage you to plan ahead for your needs. However, if you need to have your requisition handled as a priority, you should flag your requisition as URGENT. This should only be used when appropriate and should be communicated with a Purchasing Specialist in Purchasing Services ahead of time.

uShop catalog orders for \$25,000 or less are processed fastest, often within minutes of submission, and it is to your advantage to use those catalogs extensively. They include Staples, Amazon, VWR, Fisher, CDWG and more. The exception being Amazon and Staples with a \$5,000 threshold.

Orders \$25,000.01 to \$500,000.00 are subject to bid and may take as little time as a week or several months depending on the complexity of the procurement. Orders over \$500,000.00 require oversight by the NC Division of Purchase and Contract (“P&C”), which can add an additional month to the process. **Purchasing Services reserves the right to obtain quotes or process a bid document for any order as deemed appropriate.**

Emergency Purchases vs. Pressing Need

The NC Division of Purchase and Contract (“P&C”) defines “pressing need” and “emergency” as follows:

- Pressing need - a need that arises from unforeseen causes, including but not limited to, delay by contractors, delay in transportation, breakdown in machinery, or unanticipated volume of work
- Emergency - a situation which endangers lives, property, or the continuation of a vital program and which can be rectified only by immediate on-the-spot purchases or rental of commodities, printing, or services

In either case, the department should contact Purchasing Services prior to any purchase for guidance and proper handling of the order whenever possible. If an emergency occurs during non-business hours, contact Purchasing Services on the next working day so the incident can be noted, and the file can be documented.

If you have a true emergency, please contact Purchasing Services immediately for a needs assessment. If warranted, measures will be taken to honor the request.

All Purchasing Services approved emergency purchases must have a purchase requisition entered in uShop by the following business day so a purchase order can be sent to the vendor.

HUB Vendors

A vendor may be classified as a HUB (Historically Underutilized Business) vendor if their business is minority-owned, female-owned, a disabled business enterprise, or a non-profit workshop for the blind or severely disabled. Departments are encouraged to solicit competition from small and historically underutilized businesses when making any purchase.

If questions arise about proper procedure, Purchasing Services are available for clarification and assistance.

Foreign Vendors

Selecting a foreign individual or entity for your procurement transaction requires specific IRS

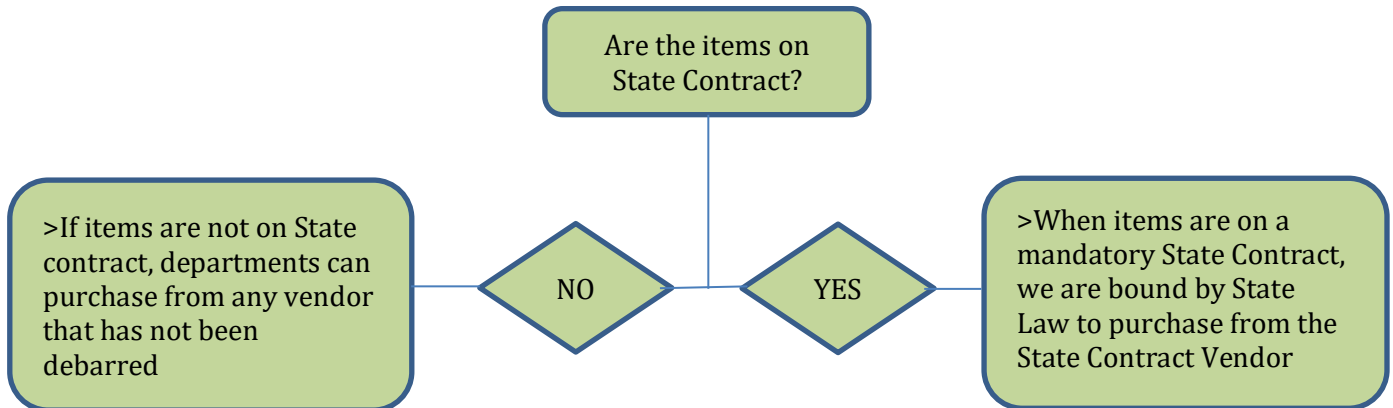
documentation for tax compliance. Foreign vendors cannot be paid by check. Wire transfer is used in lieu of check payment. The university department may be responsible for paying any applicable tax owed on behalf of the foreign vendor, thus increasing the total cost to the department. Selecting a domestic vendor, when appropriate, may be a more efficient and economical solution. Contact the University Tax Office to determine taxes that may be applicable.

Product Safety Listing

All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source, shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization; such as the American Society of Mechanical Engineers for pressure vessels; the Underwriters Laboratories and /or National Electrical Manufacturers' Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type of device offered and furnished. Further, all items furnished shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.

Continued next page.

Small Purchases (Under \$25,000)



Approved Purchasing Methods

Office Supplies

The University has convenience contracts for office supplies with Staples. Office supplies should all be purchased from Staples.

- >Catalog is in uShop
- >Purchase via uShop Requisition or PCard through uShop punchout catalog

PCard

- >Preferred purchasing method for allowable purchases under \$5,000
- >Card is used in the name of the employee, but charges are billed to the University
- >Fast, efficient, and convenient method of purchase
- >Purchases like registration fees, membership dues, subscriptions are required on the PCard when applicable
- >Transactions are viewed electronically, and statements sent to cardholders
- >Each transaction is charged to a default Banner Fund and Account, but codes can be changed, reallocated, or split coded
- >See the PCard webpage for more information

uShop Requisition

- >Department enters requisition into uShop
- >Requisition moves through workflow for approvals
- >Buyer reviews and approves
- >uShop transmits purchase order to vendor (fax or email)
- >For catalog items, the requisition will convert to a purchase order and transmit directly to the vendor
- >Vendor fulfills order & sends invoice to Accounts Payable
- >Upon receipt of goods or services, Department receives goods, completes receiving in uShop
- >Accounts Payable pays invoice

Large Purchases (Over \$25,000)

Are the items on State Contract?

NO

YES

>If items are not on State contract, the bid process will apply
>See Understanding the Bid Process below

>When items are on a mandatory State Contract, we are bound by State law to purchase from the State Contract Vendor

Approved Purchasing Methods

uShop Requisition

>Department enters requisition into uShop
>Requisition moves through workflow
>Buyer reviews and contacts department to discuss bid process
>uShop Webpage

uShop Requisition

>When items are on State Contract, a state contract vendor must be selected
>Department enters requisition into uShop
>Requisition moves through workflow
>Buyer reviews and approves
>If technology/software, ITS will also review and approve
>uShop sends the purchase order to vendor (fax or email)
>Vendor fulfills order & sends invoice to Accounts Payable
>Upon receipt of goods or services, Department receives goods, completes receiving in uShop

Bid Process

>Purchasing Services will work with departments to create specifications for goods or services
>Bid is posted to the State of NC IPS website for a minimum of 10 days
>When bid closes, Purchasing will open the bids and tabulate the responsive bids
>Purchasing sends the responsive bids to departments for evaluation. Large or complex bids may involve site visits and/or vendor presentations
>Department sends Purchasing recommendation of award

uShop

>Purchasing issues a purchase order using the originally created requisition
>Awarded vendor provides goods or services
>Upon receipt of goods or services, Department receives goods or services, completes receiving in uShop

How to Buy Goods (Non-IT)

The University’s Purchasing Services Department has exclusive responsibility for making all purchase contracts for the University with the exception of rental or real property. This includes all supplies, materials, printing, equipment, and services.

- Examples of Goods:
 - Office Supplies
 - Paper
 - Furniture and Office Furnishings
 - Scientific Supply and Equipment
 - Medical Supply and Equipment
 - Recreational/Athletic Equipment

State Term Contracts

The State has entered into contracts for goods and services with various vendors at competitive prices. Some State contracts are mandatory, and some are provided as a convenience. The University is required to purchase items provided by mandatory State Term contracts when applicable. For contract listing, see:

<https://ncadmin.nc.gov/government-agencies/procurement/statewide-term-contracts>

Guidelines

Purchasing Services operates by the rules and guidelines set forth by the State of North Carolina Purchase & Contract Division of the Department of Administration.

Dollar Value ¹	Rule	Method
\$0.00-\$25,000 Small Dollar Purchases	1. State Term Contracts if applicable, if the item is not on State contract, choose one of the following: <ul style="list-style-type: none"> • University convenience contracts (uShop) • Any non-barred vendor 	The UNCW PCard is an approved purchasing method for authorized expenditures up to the cardholder’s single transaction limit. Additionally, uShop requisition may be entered.
\$25,000.01-\$500,000 Informal Bids (Including grant funded purchases)	1. State Term Contracts if applicable; if the item is not on State contract an informal bid process will be required.	A requisition must be entered in uShop.
Over \$500,000 Formal Bids P & C Oversight	1. State Term Contracts if applicable are mandatory; if the item is not on State contract a formal bid process will be required.	A requisition must be entered in uShop

¹Dollar Value includes shipping, freight, and any other applicable fees. Federal grant procurements must comply with the State’s more restrictive requirements. For details contact the Sponsored Programs and Research Compliance.

Only Purchasing Services is authorized to issue purchase orders. Departments must submit a requisition into uShop PRIOR to receiving goods from suppliers. Purchase orders are legally binding agreements between the vendor and the University and only Purchasing Services has the authority to issue and sign these agreements.

Departments shall not divide orders in an attempt to keep them under the \$25,000 small purchase threshold, and thereby avoid the rules requiring the applicable method for competition.

Office Supplies

Office supplies are on State term contracts. Staples offers various office supplies at competitive pricing.

The Staples punch-out catalog is available in uShop. Orders are entered online in uShop, transmitted directly to the vendor, and billed to the requestor's PCard. Purchase orders are indicated by a number that starts with "CC" for credit card. Delivery from Staples is usually within 1 business day for in-stock items. The transaction reconciliation and fund approval are performed in Bank of America's software - Works. No receiving is required in uShop when the PCard is used.

Note: The local Staples store is a retail shop and not a contract location. The local store should only be used in cases when you are purchasing non-contract items or when you find yourself in a bind and a 24-hour turnaround is not sufficient. You must justify an in-store purchase in the Comment box when reconciling your transaction, and an uploaded receipt is required. The local stores should not be your primary source for office supplies. Additionally, staples.com are general consumer retail websites and are not contract sites for UNCW.

Gas Cylinder Program

The State's mandatory contract 430A for gas cylinders is awarded to Airgas USA LLC. Pricing and program details may be reviewed on the P&C State Contract webpage (see link above on page 3).

Inventories are usually taken in the month of April or May.

- Representative from Airgas/National Welders will contact Purchasing to schedule time on site to inventory each department's cylinders.
- The Purchasing Specialist will schedule inventory with departmental contacts.
- The Airgas/National Welders representative will accompany the Purchasing Specialist to the departments to record the inventory of cylinders in their possession.
- The Purchasing Specialist will notify each department of the number of cylinders in their possession and an estimate that may be used to create a standing order for the upcoming year.
- Changes to the inventory should be made at this time.

Payments for gas cylinders are made on UNCW PCard or by uShop standing/purchase order. Gas and other supplies are purchased on a separate standing order or PCard.

Automated External Defibrillators (AEDs)

Environmental Health & Safety (EH&S) provides oversight to the AED (Automated External Defibrillators) program on campus. The University has taken a risk-based approach to identify AED locations on campus, focusing on areas considered to present a higher-than-normal risk for occupants to suffer cardiac arrest (athletic and exercise facilities, patient care areas, large assembly venues, etc.). UNCW Police are also equipped with AEDs in their patrol cars as they serve as first responders.

AEDs require a physician's prescription and must be registered with the County EMS Office. Also, the AEDs

must be properly tested and maintained, personnel must receive CPR/AED training and there must be written protocols for operation, maintenance, and recordkeeping.

Departments wishing to purchase an AED must receive authorization from EH&S **PRIOR** to purchasing the AED. The approval from EH&S must be attached with your PCard documentation or in uShop with the requisition. All other purchasing rules and regulations apply (i.e., subject to competition if purchase is over \$25,000).

For more information regarding AEDs, please contact the EH&S@uncw.edu

How to Buy Unmanned Aircraft Systems, Drones and Quadcopters (UAS)

The interest in the use and procurement of Unmanned Aircraft Systems (UAS) (commonly referred to as “drones” or “quadcopters”) by UNCW faculty and staff has increased over recent years, as has the uncertainty and complexity of the regulatory environment for the operation of such systems.

UAS purchased with University funds must follow the process for UAS operation required by [UNCW Policy 05.450 Policy on the Purchase and/or Operation of Unmanned Aircraft Systems \(UAS\)](#).

All procurements greater than \$25,000 may be required to go through the process as described in “Purchasing greater than \$25,000” section of this Guide.

Items with UNCW Logos

UNCW is required by law to control the use of its trademarks and control is maintained through allowing only officially licensed manufacturers to reproduce University trademarks. Therefore, items such as apparel and promotional/gift items must use licensed vendors and submit designs for approval PRIOR to production.

Please visit, [UNCW Licensing and Trademarks](#) for more information.

Animals

All living vertebrate animals must have UNCW Institutional Animal Care and Use Committee (IACUC) approval PRIOR to purchase. Live animal purchases are prohibited on the PCard. Live animal orders should be coded to 932340 (“Animal Purchases-Live Vertebrate”);

For more information, please contact the IACUC at 910-962-3056 or iacuc@uncw.edu.

Radioactive Materials

The possession and use of radioactive materials by UNCW is authorized by the State of North Carolina, in agreement with the U.S. Nuclear Regulatory Commission. Permission to obtain and use radioactive material is granted to a faculty or staff member who can demonstrate, through training and experience, that these materials will be used in a safe and proper manner consistent with all regulations. This permission is granted to a qualified faculty or staff member upon an application to and approval by the University Radiation Safety Committee. The Committee also empowers the Radiation Safety Officer to ensure compliance with regulations and carry out the administrative duties of the Radiation Safety Program at the University.

For more information, contact the Radiation Safety Office at 910-962-3057 or visit:

<https://uncw.edu/ehs/radiation.html>

Used Equipment

All used equipment purchases must be approved in advance by Purchasing Services. Any used equipment purchase request must include the model number, condition, and age of the equipment being requested and detail what makes the purchase of the used piece of equipment a better overall value than purchasing new (including cost and warranty). If the item is available on State Contract, departments must also submit a comparison showing the contract price versus the used equipment price. With the purchase of a used item comes a risk that the item will not work as intended and most used items do not come with a warranty or guarantee of working condition. As such, the department must state in writing if they are willing to accept the risk of purchasing a used item.

If purchasing from an online auction site (i.e., eBay) using the UNCW PCard, the payment will need to go through PayPal using an UNCW email address, mailing address, etc. and the item must be purchased from a vendor, not an individual. PCard holders must put their approval email with their statement to show the purchase of used equipment was approved in advance.

All used equipment purchases are also subject to funding source approval and have a UNCW business purpose documented.

Any questions about this process or purchasing should be directed to Purchasing Services at purchasing@uncw.edu

How to Buy Printing

UNCW Printing Services has the first right of refusal to any print job. Printing Services are to be emailed by the department with the requirements. Printing Services will provide either (1) an email quote with delivery date or (2) a response stating the job cannot be completed by Printing Services at this time.

If Printing Services decline the job, purchasing procedures for printing are the same as other commodities/services. For print jobs exceeding \$25,000, competition and the bid process will be required. It is critical that departments allow sufficient lead time for Purchasing Services' bidding requirements to be met as well as the print vendor's delivery times to ensure printing is performed on schedule.

Copiers

UNCW's copier program is operated by Printing Services. To request more information, service, or supplies, please contact: 910.962.3697.

Enterprise Car Rentals

The North Carolina Department of Administration has entered into a contract with Enterprise Rent-A-Car which authorizes UNCW employees to utilize Enterprise for business use. Most rentals are in conjunction with employee travel and student group travel. In those cases, the transactions are processed in Chrome River Travel System. Questions about travel-related rentals should be directed to the Travel Office.

Some departments need a rental vehicle for local use, for example in the operation of summer camps. Those transactions are processed in uShop after obtaining a quote from Enterprise. The driver of the vehicle must be a UNCW employee (not a student or vendor).

How to Buy Services

The University's Purchasing Services has exclusive responsibility for making all purchase contracts entered for the University with the exception of rental or real property. This includes all supplies, materials, printing, equipment, and services.

For the application of purchasing rules, services are divided into three categories:

- General services
- Consultant services
- Personal services/Independent Contractors

General service contracts are subject to the rules of competition. Consultant services, depending on the scope of the assignment, may require Chancellor approval and/or competition. Personal services typically are not bid but may be if doing so is in the best interests of the university and in lieu of competition a sole source justification may be required.

Employees of UNCW or other state agencies cannot be paid for personal services or consultant services. In accordance with UNCW Policy 05.133, such payments are subject to the Dual Employment Policy. Nor can an individual serve as both an employee and provide contracted personal or consultant services in the same calendar year (i.e., an individual cannot receive W-2 and 1099 compensation in the same calendar year).

Regardless of the proposed services category, its procurement is initiated by submitting a purchase requisition that includes the detailed specifications of the work.

Specifics for each category follow below. Training is available through the Finance Training Program (see useful links above) or contact Purchasing Services for assistance on how to proceed with your procurement.

- Examples of Services:
 - Consulting (either academic or business related)
 - Dining
 - Publishing rights, intellectual property rights
 - Janitorial
 - Maintenance
 - Porta Potty
 - Printing
 - Hotel Contracts (including conferences)
 - Lecture or performance
 - Repair
 - Uniforms
- Regardless of service category, prepayments, deposits, and retainers may be permitted.
- Contracts must be approved and executed by the Director of Purchasing Services prior to services beginning.
- By statute, state employees may not personally benefit from a university contract. Nepotism is not permitted.
- Departments should not sign contracts, agreements, MOU's, etc. for goods or services. The result will be a non-compliant agreement for which the signatory may be held personally

liable by the vendor. For more information on the authority to sign various types of contracts, visit the Office of General Counsel “Contracts” Webpage (see useful links on page 3 above). Note the footnote (*) on the final page of OCG’s “Signature Authority Chart” for important restrictions to signature delegations.

Information to include on the purchase requisition:

Type of Service Required

A full statement of work; what is it a vendor needs to do for a department. Attach to the purchase requisition any vendor provided quote or contract and vendor contact phone and email. For equipment maintenance, include equipment make, model, serial number, location and UNCW contact.

Total Dollar Value of Contract over a One Year Period

Need to know the total expenditures per year to assist with choosing the proper bid process requirements as well as the appropriate approval levels.

Request Start and End Dates

Keep in mind fiscal year and splitting money within a fiscal year.

Exceptions for General Service Contracting

The following services are exempt from competition but, based on the cost of the services (or other factors), the vendor may need to agree to UNCW terms and conditions:

- Architect and Engineering Services or other similar services related to building construction, maintenance and repair are arranged through the University's Facilities Services Department.
- Installation services which are incidental to the purchase of supplies, materials or equipment are acquired under the same requisition used for equipment or supplies.
- Services provided directly by an agency of the state, federal or local government or their employees when performing service as part of their normal governmental function are purchased through Purchasing Services; however, competition is not required for such services.

Requirements for Consulting Services

Consultants are differentiated from other service providers by the nature of their a) skills and b) the contracted work. The State defines consulting services as:

*Service is defined as work or tasks performed by State employees or independent contractors possessing specialized knowledge, experience, expertise, and professional qualification to **investigate** assigned problems or projects and to **provide counsel, review, analysis, or advice in formulation or implementing improvements in programs or services**. This definition includes but is not limited to, the organization, planning, directing, control, evaluation and operation of a program, agency, or department. Whenever possible, consulting services shall be obtained from other State agencies when the services available from other agencies substantially meet the reasonable specifications of the requesting agency.*

When a department needs consulting services, a memo addressed to the Director of Purchasing Services and written by the faculty or staff member overseeing the work should accompany the purchase requisition. The memo should address the following points:

- a) What services the department desires to secure
- b) What benefits the department expects to receive from the consultant service

- c) What is the estimated cost of the service
- d) What sources the department has identified
- e) Why the work cannot be performed by the department

Purchasing Services will review the memo and determine if competition is required, if Chancellor approval will be required, the appropriate form to memorialize acceptance of UNCW terms and conditions, and other approvals or actions needed. Please contact Purchasing Services for guidance through this process.

Requirements for Personal Services/Independent Contractors

Purchasing Services has a comprehensive website to assist departments with initiating personal services. Please visit “Independent Contractor” webpage or the uShop Special Processing Form for Independent Contractors for the most current information, forms, and resources. The following is a partial list of requirements for contracting personal services.

- All employees of UNCW, including student employees, are paid through payroll and not contracted through Purchasing.
- Recent retirees may lose benefits if they work for UNCW. Contact HR for guidance.
- Employees from other NC agencies are paid through the dual employment process. Contact HR for guidance <https://uncw.edu/hr/talentacquisition/dualemployment.html>. Note: K-12 teachers are *not* state employees.
- Procurement of services performed by family members or companies owned by employees is not permitted. Temporary employment may be an option in the case of the former. contact HR for guidance.
- Foreign nationals must provide appropriate documentation and may be subject to Federal tax (30%) and/or NC Withholding tax (4%). Contact the Tax Office for guidance <https://uncw.edu/tax/>.
- Services normally performed by an employee (as an example, but not limited to, teaching or research) will be reviewed by the Tax Office and/or HR to determine if engagement as a temporary employee is appropriate.
- Vendors charging more than \$25,000 have a written and signed agreement, inclusive of UNCW terms and conditions. Contact Purchasing Services to draw up the contract, service addendum, quote form or other needed document. Depending on the services, a contract may be required for amounts far less than \$25,000. Examples include, but are not limited to, rights to intellectual property and complex services where clarification of responsibilities, deliverables, etc. are needed. Please contact Purchasing Services for guidance through this process.

How to Buy Information Technology Goods & Software

Computer Hardware Purchases

All computer purchases are placed through uShop. No check vouchers, personal reimbursements, or PCard purchases allowed. Basic purchasing policies and procedures apply.

Combined Pricing Initiative (CPI)

On July 1, 2010, purchasing procedures were implemented by the UNC System Office for PC desktop and laptop computers. These procedures are a required mandate of all the UNC institutions. This bulk IT purchasing program is called the Combined Pricing Initiative (CPI). The program was instituted to reduce

expenses by taking advantage of the combined purchasing power of the 16 campuses and to meet requirements of the North Carolina legislation.

UNCW Campus Standard for Computers, Tablets, and iPads

- Dell Desktop/Laptop and Apple computers are recommended as the CAMPUS STANDARD.
- All Non-Standard computers and tablets, to include HP, Lenovo, and Surface Pros, must be submitted through uShop using the **Non-Standard Computer Request Form** with an attached quote detailing the configuration of the computer system.
- Dell products are available through the Dell uShop punchout catalog. A quote can be requested from the UNCW Dell representative when the punch-out catalog does not have the required dell computer configuration as a Standard listing.
- Apple computers and iPads must be purchased via the Apple uShop punchout catalog. Apple Computers and iPads do not require a Non-Standard Computer Request Form.

Computer Software, Accessory and Peripherals Purchases

Basic purchasing procedures apply to all software, accessory, and peripheral purchases. No check vouchers or personal reimbursements allowed. Purchases under \$5,000 may be made with a PCard (*PCard policies & procedures apply*). Research should be conducted to see if any of the items are on contract prior to purchasing. **All technology purchases are subject to IT approval.**

Adobe Products Purchases

- Adobe Creative Cloud is now licensed through ITS. For more information visit: <https://uncw.edu/itsd/working/adobe.html>

Other Adobe products (such as Captivate, Contribute, ColdFusion Enterprise, Director, Font Folio, Frame Maker and Presenter) are ordered through uShop with the non-Catalog form. For detailed ordering instructions visit ITS webpage:

<https://uncw.teamdynamix.com/TDClient/1875/Portal/KB/ArticleDet?ID=15703>

Custom Software

Custom Software Products may require the acceptance of a license agreement prior to use. Software License Agreements (SLA)/End User License Agreements (EULA) are legally binding contracts and must be reviewed by Purchasing Services. **Exception: Packaged Copyrighted Software (i.e., Microsoft, QuickBooks, and Adobe products).**

Hosted Software

Software that is installed, hosted, and accessed entirely from a remote server or location, typically over the Internet, is considered hosted software and requires an additional review. Vendors offering hosted software are required to go through an IT review. Please complete the Software/IT Related Solution form located in uShop.

Software and Professional Services/Maintenance/License Agreements

In order to ensure that the University is in compliance with the state's legal requirements for software vendors and service providers, the following process is required when seeking software and software related services.

- Identify need (What software/services are you purchasing).
- Request a quote, license agreement and/or the maintenance agreement from vendor, if applicable.
- Submit a requisition in uShop with the Software/IT Related Solution form for IT to approve

- Once approved, a Purchase Order will be issued to the vendor.

IT Contracts

The NC Department of Information Technology Services (DITS) has established contracts for IT related products <https://it.nc.gov/resources/it-strategic-sourcing/statewide-it-contracts>

Main IT contracts utilized:

- 204A – [Microcomputers and Peripherals](#) (CPI Rules Apply)
- 204D – [Printers and Peripherals](#)
- 208H – [Microsoft Select Agreement](#) (Microsoft Products other than what is offered free through State Department of Information Technology DIT)

IT Contract Vendors in uShop: GovConnection • CDWG • Dell • Apple

NOTE: These contracts are mainly convenience contracts and are not mandatory; however, in some cases they offer better pricing with educational discounts along with free shipping and personal service.

Contact the Higher Education Sales Representatives listed in the contract for product and pricing information.

Domains

Requests and information regarding domains can be directed to IT Infrastructure at tac@uncw.edu.

Telecommunications - Cellular, Broadband and Pager Services

Departments are required to order cell/pager service, calling cards and internet broadband service through IT. For more information visit IT Phone Help webpage:

<https://uncw.edu/itsd/help/phonehelp.html>

Any questions about this process should be directed to TAC (910-962-HELP) or tac@uncw.edu

Understanding the Bid Process

Purpose

The following information is provided to help purchasing departments and requisitioners understand the responsibilities and sequence of events that must occur with every bid required on non-contract items over \$25,000 (\$10,000 for Grant funded procurements).

Bid Objectives

The goal of every bid is to satisfy the Five R's of Procurement:

- The Right Quality,
- The Right Quantity,
- The Right Price,
- The Right Place and
- At the Right Time

All as specified by the department while complying with NC Purchasing Rules, Regulations, and UNCW policies and procedures.

Responsibilities

- a) Requesting Department: To provide the specifics (i.e., detailed description of goods and/or services) of what is required to fulfill the particular need; to obtain funding and to oversee the contract once it is awarded.
- b) Purchasing Specialist: To oversee the process of obtaining goods and services for a department ensuring that State and University policies and procedures are met as required by law.
- c) Bidding Vendor: To provide the goods and/or services to the department as specified by the bid documentation.

The Bid Process

Request for Quote (RFQ)

A Request for Quote (RFQ) is generally required when goods and/or services cost between \$25,000 and \$500,000. Requesting departments should enter a requisition into uShop with a detailed product description, quantity, and estimated cost based off market research or a vendor quote. A minimum of three (3) quotes must be solicited either by the department or Purchasing Services. The lowest cost vendor meeting the specifications of the good and/or service is generally issued the purchase order.

Invitation for Bid (IFB)

The Invitation for Bid (IFB) is a formal bid process that is typically used for goods and/or simple services that cost more than \$25,000. Please note that the University's delegated threshold is \$500,000, so anything above that threshold will require the State's Purchasing & Contract Division's approval. Requesting departments should enter a requisition into uShop with a detailed product description, quantity, and estimated cost based off market research or a vendor quote. Requesting departments should use Purchasing Services as the supplier when initially entering the requisition because the supplier that will be awarded and issued the purchase order will be unknown at that time.

Invitation for Bids typically take 30 to 45 days to process and must be advertised on the State's solicitation website (NC Interactive Purchasing Services) for a minimum of ten (10) days. Generally, the lowest cost vendor meeting specifications will be awarded the bid.

Request for Proposal (RFP)

The Request for Proposal (RFP) is a formal bid process that is typically used for complex services that cost more than \$25,000. Please note that the University's delegated threshold is \$500,000, so anything above that threshold will require the State's Purchasing & Contract Division's approval. Requesting departments should enter a requisition into uShop with a detailed description of goods and/or services, quantity, and estimated cost based off market research or a vendor quote. Requesting departments should use Purchasing Services as the supplier when initially entering the requisition because the supplier that will be awarded and issued the purchase order will be unknown at that time.

Requesting departments must provide Purchasing Services a detailed scope of work, estimated cost, estimated delivery, award criteria, questions for vendors, and preferred contract term (i.e., initial three (3) year term with two (2) additional one (1) year terms). Please note that most contract terms will not exceed five (5) years to include any additional renewal terms. Purchasing Services will enter

the provided information into the State's RFP template and assist the department with editing the information provided (i.e., detailed scope of work, questions to vendors, etc.).

Request for Proposals typically take 60 to 90 days to process and must be advertised on the State's solicitation website (NC Interactive Purchasing Services) for a minimum of ten (10) days. Request for Proposals require an evaluation committee of three (3) or more people to evaluate the proposals received. Evaluation committee members will sign a non-disclosure agreement and recuse themselves if there are any conflicts of interest between them and the vendors who submit proposals. The evaluation committee will evaluate the proposals received and the vendor with the highest score will be awarded the contract.

Instructions for Waiver of Competition (Orders over \$25,000)

Competition may be waived for a solicitation pursuant to the specific conditions listed in 01 NCAC 05B.1401.

This method requires completion of the Single/Sole Source Request that can be found on the Purchasing Services website. The Single/Sole Source Request is submitted with the requisition and reviewed by Purchasing. Upon approval by Purchasing, Purchasing Services will send a bid document to the single/sole source vendor to 1) establish firm pricing and 2) include UNCW's Terms and Conditions.

When an item or service is clearly and legitimately available from only one known source of supply, this is called a Sole Source. Research is required to confirm there is only one source and documentation is needed for the file. The Single/Sole Source request shall include explanation of features which are unique and essential for the intended use that other manufacturers of like products do not offer. Some examples of sole source procurements include:

- Items which must be operationally compatible with existing equipment or systems and are available only from the original manufacturer.
- Items that have specific or clearly unique features essential for the completion of the task or project at hand that are available from only one source.

Preference for one vendor, product or service does not constitute a single/sole source. Departments should note that year-end funding considerations are not sufficient grounds to approve a single/sole source purchase. Remember that if the required good or service is available from more than one source, and you desire to obtain from a specific vendor, it is not considered a sole source and is a single source request.

Brand Specific

At times, a certain brand of equipment or item is needed. When a single, preferred product is required, it is called Brand Specific. Examples of brand specific procurement include:

- When changing brands or manufacturers would compromise the continuity of the research project or proprietary items; e.g., copyrighted software, publications, etc.
- When a grant sponsor's contract specifies a certain brand of instrument or equipment (Department will be required to attach appropriate section of grant to verify this information).

The Single/Sole Source request will include explanation of features which are unique and essential for the intended use that other manufacturers of like products do not offer and should be submitted with the uShop requisition for Purchasing Services for review and approval. Purchasing Services may send a bid document to multiple vendors for a brand specific purchase with the required specifications.

All Sole Source and/or Brand Specific purchases must be justified by the end user and approved by Purchasing Services. The use of Sole Source or Brand Specific shall be limited only to those specific instances which are totally justified to satisfy compatibility or technical performance needs.

Receiving Services/ Dock Delivery/Shipping Services

Receiving of goods purchased by purchase order takes place upon delivery of goods by the vendor or shipping company. Goods shall be checked upon receipt for acceptance and conformity to specifications. The Purchase Order shall be received in the E-Procurement system (uShop) at the time of delivery.

Receiving of services purchased by purchase order takes place upon acceptance of the service that has been provided. The Purchase Order shall be received in the E-Procurement system (uShop) at the time services are completed.

All receiving in uShop shall be completed within 48 hours of receipt of the goods or services.

Desktop Delivery

Air express packages and other UPS, FedEx, or DHL deliveries are shipped directly to departments according to the delivery address stated on the purchase order.

Dock Delivery

Bulk ground orders via common carrier or truck freight, and other deliveries are received by Warehouse Services personnel during normal business hours of 8:00am-12:00pm and 1:00pm-5:00pm Monday-Friday. Summer hours and holiday hours are different; visit [Warehouse Services' web page](#) for details.

The receiving dock is located at the Warehouse facility on 5179 Lionfish Drive in the back of the Main Campus. Deliveries are noted on daily delivery logs and are delivered within 48 hours once department is notified of receipt to verify drop off locations to the address noted on the shipping label. Please contact Warehouse Services at 910/962-3620 or warehouse@uncw.edu if you have questions or need assistance.

Shipping Services

Warehouse Services also ships out packages by FedEx and UPS.

UNCW Campus Ship (UPS Campus Ship) is a web-based, UPS-hosted shipping solution that helps you increase efficiency and reduce costs. Shipping and Receiving can ship your business packages to off-campus sites. We have negotiated lower shipping rates with FedEx and UPS (but not USPS), which provides a cost savings to the University. To learn more visit: <https://uncw.edu/warehouse/shipreceive/campusship.html>

Disposal of Goods and Equipment (Surplus Property)

UNCW Surplus Property is responsible for tracking and disposing of ***any and all*** goods and equipment purchased with any University funds¹ or donation in accordance with State policies and procedures.

Surplus has a variety of office furniture and equipment in their warehouse and is a great resource when an item is needed quickly or at no cost to the department. For information contact surplus@uncw.edu or 910/962-2289 or visit <https://uncw.edu/warehouse/surplus/index.html>

Guidelines for Surplus and Disposal

All equipment and supplies are the property of the State until the appropriate approvals and disposition processes are followed.

The following guidelines apply:

- Items that are no longer needed by a department are required to be disposed of through UNCW Surplus Property procedures.
- Under no circumstances can State property be simply thrown away, given away or taken home.
- Transactions involving property being used as a trade-in must be first approved by Surplus Property (details below).
- The value or condition of the item slated for disposal does not matter; Surplus Property must handle the disposal in all cases.

Procedures for Disposal of University Property

Departments initiate their disposals by submitting an online Disposal Request by logging into MySeaport. For instructions and details, including how to request access to the Surplus Property System, visit the [Surplus Property website](#)

Biohazard/Contaminated Property

Before lab or clinical items can be surplus, Environmental Health and Safety is required to inspect the items for contaminants and approve removal from the lab or clinic prior to being surplus. An item is considered contaminated if it has had contact with body fluids or blood, hazardous chemicals, etc. Departments, labs, and clinics are responsible for notifying EH&S.

Equipment Trade-In

When equipment is to be used as a trade-in for a discount or credit on a replacement order (and not being sent to surplus) the State Surplus Officer must approve the disposal. There must be a specific replacement item being ordered; UNCW cannot take a “credit on account” for a future, to-be-determined purchase. Notation of trade-in and value should be included in the PO, and the net value encumbered. Purchasing will make the request but will need details about the trade-in from the department.

Below is a sample request:

Trade In Disposal Request:

We are requesting approval to trade in the following property.

Fill in the following:

Description of Item(s) - Sim Woman and Baby

FAS # (if applicable) - 000046456

Current Condition - Poor

Original Purchase price total - \$32,910.66

Date of Purchase(s) - 04/26/2005

Name of Vendor Offering Trade-in Allowance - CAE HEALTHCARE

Price of Replacement Item Before Allowance - \$86,272.00

Amount of Trade-In Allowance - \$6,000

Final Purchase Price - \$80,272.00

Brief justification for trading property in verses selling to the public – Per the Department (School of Nursing) the equipment has a “bad leg” and is not usable for teaching application. A trade in for this equipment would be the best option as they are getting a set discounted amount for the new equipment, rather than submit the equipment to sale through Surplus.

If the equipment is tagged, then the department requesting the approval for trade-in will have to provide that FAS tag number for the complete information to be sent to State Surplus.

Once the Trade-In Request has been approved, a PDF of the approving email is attached to the requisition and a uShop comment created to the Fixed Assets Administrator, noting to that individual that tagged equipment is being moved. The Fixed Asset Administrator will contact the department for any additional documents that require updating.

Department will coordinate pick-up of the trade-in with vendor, using Warehouse Services if needed.

Disposal of Street Legal Vehicles

The following steps should be taken to surplus a departmental vehicle:

- a) Notify UNCW Surplus Property to start the process for surplus of a vehicles
- b) Return all gas card(s) to Purchasing Services (if applicable)
- c) Remove any UNCW property from vehicle
- d) Bring all LICENSE PLATE(s), KEYS, and any MILEAGE logs to Surplus

PLEASE NOTE: The department will be responsible for insurance coverage until tags are removed and Risk Management requirements are satisfied. Contact Institutional Risk Management for more information.

Fixed Assets

What is Fixed Assets Responsible For?

Fixed Assets identifies, tracks, manages, and reports the University’s capitalized assets. Tracking activities include tagging newly acquired equipment, oversight of the annual physical inventory and maintaining a property database via Banner including the disposal of Surplus assets in

accordance with State rules and regulations. Additionally, Fixed Assets can provide asset reports by department, building or location, in preparation for departmental moves, supply information on stolen assets for police identification, provide custodian identification for assets, and answer questions regarding University policy and procedures for Fixed Assets.

- UNC- Business Process Standards require all universities within the UNC System to follow system-wide Capital Asset Standards.
- The purpose of tracking fixed assets is for financial accounting, preventive maintenance, and internal controls including theft deterrence.

Fixed Assets Threshold:

- Equipment with a purchase (or donation/gift) cost of \$5,000 or more (any funds, including Grants) including shipping, legal fees, and installation.
- Acquisition value (price that would have been paid to acquire the asset) should be used to record equipment received as a donation/gift. Receipt of the gift must be coordinated with University Advancement Services.

When purchased equipment meets the threshold, Fixed Assets will notify the department via e-mail to schedule a tagging appointment after the invoice is paid. The organization that the equipment will be assigned to and the location of the equipment will be verified at this time.

Annual Fixed Asset Equipment Inventory:

The University is required by the State to take an annual equipment inventory. Each department is accountable for their inventory and is responsible for verifying and reporting any changes or corrections to Fixed Assets.

For more information about Fixed Assets visit <https://uncw.edu/fixedassets/>.

Updates

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Version Control Number	Date	Author	Change
22.03	09/22/2022	UNCW Purchasing	Final formatting & updates
22.02	08/04/2022	UNCW Purchasing	Formatting & updates.
22.01	07/01/2022	UNCW Purchasing	Update to spend threshold and Waiver of Competition section.