Date: March 15, 2011

From: Steve C. Blazer, Assistant Director, Purchasing Services

Distribution: Campus Directors of Business Services
Financial Officers
Guru Posting
eBuy List Serve
Purchasing Website (www.purchasing.psu.edu)

Subj: STANDING ORDER PREPARATION - Fiscal Year 2011/2012

Standing Orders may be processed electronically through eBuy+ for the 2011/2012 fiscal year. To allow sufficient time for us to review and process your request, all Standing Order requests should be received by Purchasing Services no later than May 13, 2011. Requests received after that date will be processed but may not be finalized by fiscal year-end.

Before you submit a request, please evaluate whether it is in fact necessary to renew your Standing Order. The availability of Purchasing Cards and eBuy, has eliminated the need for many Standing Orders and may provide an alternative method of payment for your purchasing needs. Current eBuy suppliers include: Apple Computer, Applied BioSystems, CDW-G, Dell Computer, DOT Scientific, EMSCO/Corning, Grainger, Invitrogen, K.I. Corbett, Lenovo, McCartney’s, MSC Industrial Supply, Newark, Office Max Technology, PSU Computer Store, PSU General Stores, Sigma-Aldrich, Supply Source, Technology Integration Group, The Hite Company, Thermo Fisher Scientific, VWR International, WESCO Distribution, Inc., etc. Visit www.ebuy.psu.edu to view all eBuy suppliers.

All Standing Orders are subject to normal purchasing procedures including audit and continual review by Purchasing Services. Any Standing Orders in excess of $10,000 or Standing Orders that are increased during the fiscal year to exceed $10,000 require evidence of competition or sole source justification. When choosing a supplier, please keep in mind their diversity status (minority and/or women owned) and their ability to provide environmentally sustainable products.

In the event that you need to increase your Standing Order balance during the fiscal year, you must submit an eBuy+ Purchase Order Change Form to Purchasing Services. Standing Order payments that exceed the Standing Order balance will not be approved for payment.

Please note that with the new ebuy system you are able to set up standing orders for multiple year use in legitimate situations. These are to be used for multi-year leases, University contracts, or agreements where the pricing is fixed for multiple years. They are NOT to be used as a tool to save end users from entering a new standing order each year. Multi-year standing orders without justification will be rejected by the purchasing agent. If in doubt, please contact the purchasing agent in the particular commodity area.
Please follow the guidelines below when entering your Standing Order requisition:

1. Enter the standing order requisition using the Standing Order form in eBuy+. The “Fiscal Year Date” should be 2011/2012.
2. Realistically estimate the annual dollar requirements of the Standing Order.
3. Identify in detail the type of item(s) to be purchased.
4. If the Standing Order replaces a previous year’s Standing Order, identify the previous Standing Order Number.
5. For items on continual rental, lease, or maintenance, include serial number(s) of unit(s) covered. Use individual orders for rental, lease, and/or maintenance agreements.
6. Name the individual(s) authorized to initiate orders with the supplier. Do not state “or authorized representative.”
7. Specify the method of pick-up or specify the delivery point. An individual authorizing an order should not also be verifying the receipt of the items. In the event items must be authorized and picked up by the same individual, the signed receipt must be turned in to a second individual within the department for receipt verification and payment authorization.
8. A receipt should be signed when material is picked up from a supplier. Be sure a copy is returned to the department or Financial Officer.
9. Equipment purchases are not permitted on Standing Orders.
10. Items offered by General Stores are not to be purchased on Standing Orders from outside suppliers.

Please see below for more detailed Standing Order entry instructions. Instructions for Standing Order preparation may also be found on the Purchasing website at http://www.purchasing.psu.edu. You may also find other very useful information on our website.

Standing Order

1. Log into eBuy and select the proper account. From the eBuy “home/shop” screen, click on the “Standing Order Request” link.
2. Complete the following fields: Product Description\textsuperscript{1}, Single or Multi year\textsuperscript{2}, Total Cost\textsuperscript{3}, Commodity Code\textsuperscript{4}, Health and Safety\textsuperscript{5}, Beginning\textsuperscript{6} and Ending\textsuperscript{7} Time Period, Number of Years\textsuperscript{8}, Encumbrance amount for each Fiscal Year\textsuperscript{9}, Department Name\textsuperscript{10}, Standing Order being replaced\textsuperscript{11}, Authorized Users\textsuperscript{12}, and Supplier\textsuperscript{13}. When completed, click the yellow “Go” button\textsuperscript{14}.

Note: In the Product Description field box, please specify what type of order it is (Standing Order, Radioactive, Lease, and Trade In). Make sure that the order type is the first few words that appear in the field box. Note: To review Standing Order information after the form is saved to a cart, simply click the “more info…” link\textsuperscript{1} at the end of the Product Description.