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Contact Us – Procurement and Payment Services

General Help Line: (607) 254-5300

PCard Help Line: (607) 255-4548 or (607) 255-5039

Email: procurement@cornell.edu

Website: www.procurement.cornell.edu

Office: 395 Pine Tree Road, Suite 330, Ithaca, NY 14850

Things to consider before you make a purchase

1. Ensure that your intended purchase is an allowable business expense for which University funds may be expended. See University Policy 3.14, Business Expense.
2. Do not sign any contract. A contract should not be executed without an authorized Procurement Agent’s signature as per University Policy 4.2, Transaction Authority and Payment Approval.
3. Ensure that your intended purchase is allowed by the sponsor when using sponsored funds.
4. Use the Procurement Decision Flowchart (page 4) to determine the next steps you must take.

Using the Procurement Gateway

The Gateway is a tool that allows you to see a listing of your orders, place requests for purchases, locate vendors, and more! You can quickly:

1. Identify your Business Service Center (BSC)
2. Identify your procurement options – I Want Doc, e-SHOP, or procurement card (pcard)
3. Login to e-SHOP or the I Want Doc
4. Review or search your orders

www.gateway.procurement.cornell.edu

The screenshot shows the Procurement Gateway website. On the left sidebar, there are four main navigation options: 'e-SHOP' (Cornell University Online Buying), 'PCARD RECEIPTS Submit and Review', 'I WANT DOC Request Goods and Services', and 'PROCUREMENT WIZARD How to Buy?'. A blue box with the number '3' has two red arrows pointing to the 'e-SHOP' and 'I WANT DOC' options. The main content area includes a 'Procurement Services Home' header with a welcome message to 'Mary Lourdes Flaherty'. Below this, there are links for 'University & Small Academic Finance Service Center' and a dropdown menu labeled 'Select FTC/BSC to send email:'. A blue box with the number '1' is placed over this dropdown. To the right, a 'My Procurement Options' box shows the user is an 'I Want Doc User' and an 'e-SHOP User', with a blue box containing the number '2'. Below this is the 'My Orders' section with search filters for 'eDoc#', 'Vendor', 'From Date' (12/12/2015), and 'To Date' (03/11/2016). A blue box with the number '4' is placed over the 'Total Records found: 23' text. At the bottom, there is a table with columns: Date, eDoc#, Type, Description, Vendor, Status, Amount, Copy, and Log.

Buying in 4 Easy Steps

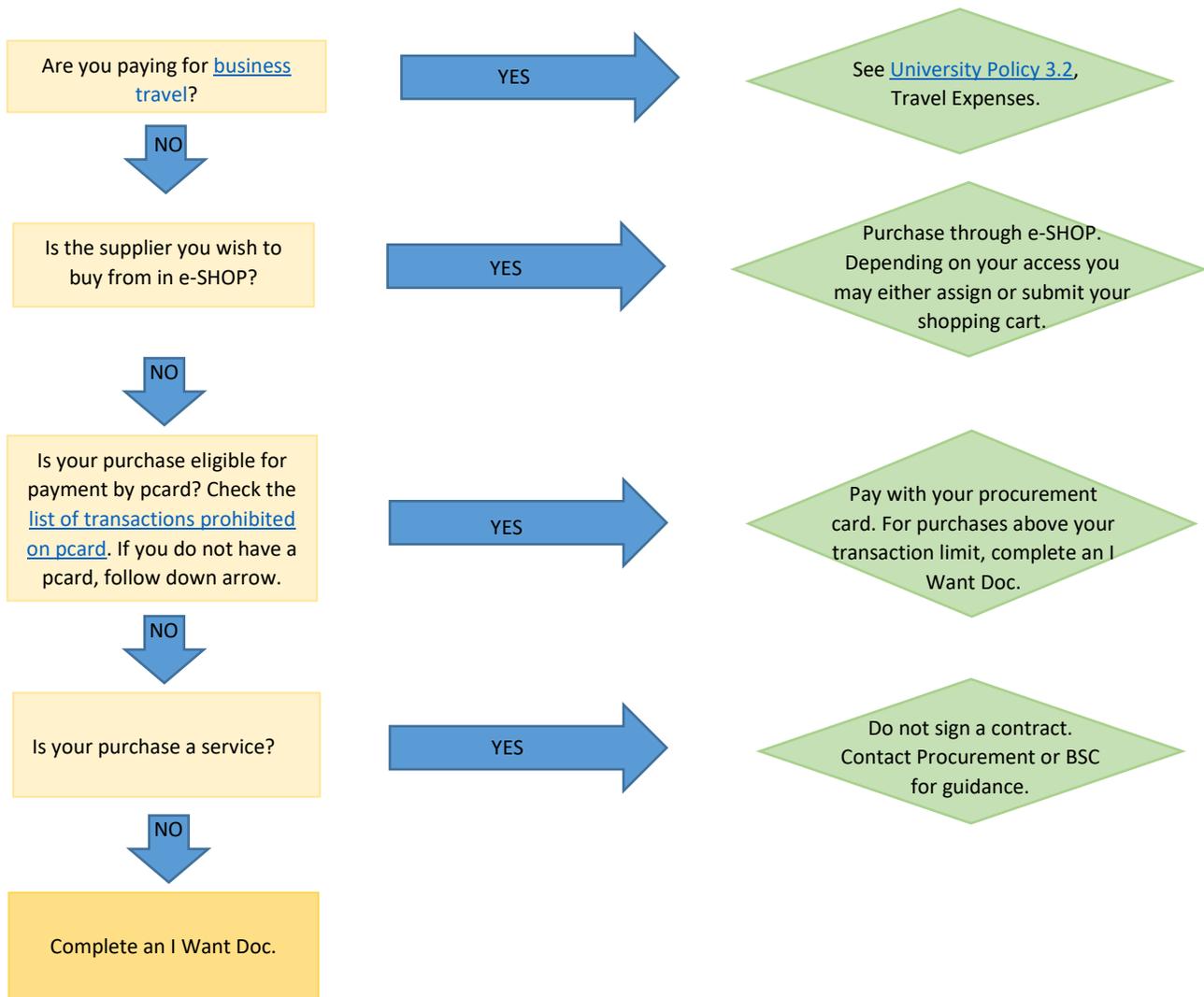
1. Review the list of preferred suppliers on the Procurement Services website at <https://www.dfa.cornell.edu/procurement/supplierlistview>. If a preferred supplier agreement exists for the good or service that you want to purchase, then use the preferred supplier, e.g., W.B. Mason for office supplies, Vasco Brands for janitorial supplies, Dell or Apple for computers.
2. If the supplier you select is available in e-SHOP, then begin your order in e-SHOP as it simplifies the data entry and ensures you receive the discounted pricing. All suppliers in e-SHOP offer discounts to Cornell.

3. If the supplier is not available in e-SHOP, then you must determine whether the purchase is eligible for payment via [pcard](#). Please check the list of prohibited pcard transactions at <https://www.dfa.cornell.edu/sites/default/files/bm-section-302.pdf>.
4. If not eligible for purchase via pcard or the cost is greater than your pcard limit, then complete an [I Want Doc](#).

Procurement Decision Flowchart

Prior to reviewing this flowchart, you must:

1. Consult University Policy 3.14, Business Expenses to ensure that your intended purchase is Cornell allowable
2. If you are paying with sponsored funds, ensure that your intended purchase is allowed by the sponsor.



What happens when I submit an I Want Doc?

1. The end user creates an I Want Doc which is automatically routed to the BSC.
2. The BSC reviews the request and determines the method of ordering.
3. If eligible for payment via procurement card, then the center will use its higher level card to make the purchase and payment.
4. If a Purchase Order (a legally binding contract with specific terms and conditions between the university and vendor) is necessary, then the BSC creates a requisition in the Quali Financial System (KFS).
5. Purchase orders under the university's bid limit are approved by the college or administrative unit's fiscal officer and transmitted to the vendor.
6. Orders over the university bid limit are routed to Procurement Services for review, bid evaluation, contract review, and approval.
7. Once the vendor fills a purchase order, the vendor will submit an invoice to Cornell.
8. The service center will confirm the department received the goods or services before approving an invoice for payment.
9. The unit's fiscal officer or delegate will approve the payment, and a payment will be issued to the vendor.

Orders above \$25,000

Procurement Services is responsible for requesting quotations or proposals from suppliers at expenditure levels above \$25,000 or when specific fund types are used. Good purchasing practice dictates that requests for proposals and quotations to responsible suppliers effectively develop competition and guard against favoritism, improvidence and fraud. The primary purpose of competitive bidding is to insure and demonstrate that funding is being responsibly spent and equal opportunities are being extended to responsible suppliers.

Where competition may not be feasible due to the single source/sole source nature of a commodity or a particular specification, a written justification is required and reasonableness of price must be established. Use the [single/sole source justification form wizard](#) for all purchases over \$25,000 for all fund types. Additional procedures are required for NY State-appropriated funds. For more information on exceptions to the university's bid requirement, contact your service center or Procurement Services.

Requesting a competitive bid

To request a bid solicitation, e-mail procurement@cornell.edu with the specifications and potential list of vendors. Use the form available on the Bid Solicitation web page at <https://www.dfa.cornell.edu/procurement/tools-forms/forms/bid-solicitation>.

Bid process

Procurement Services will assist the unit in developing specifications, identifying potential sources (vendors), and will issue all requests for bidding. During the competitive bid process, Procurement Services controls all information to ensure that all suppliers receive the same information. Supplier responses are kept confidential. Suppliers may receive general feedback on their response relative to other suppliers. New York state (NYS) appropriated funds are subject to public bidding.

Procurement Services will tabulate the bids and present the information to the unit. The unit will select the winning bidder. Awards of bids are made on a best value basis. Lowest pricing award does not require any additional explanation. Awards made for reasons other than low pricing require documentation of the reasons for the award.

Paying for Services

A service is an activity in which labor is the major factor and not merely incidental to the production, acquisition, and/or delivery of a good. Nearly all services, regardless of where they are performed, require both a contract and verification that the vendor meets the university's insurance requirements. The procurement of services has unique requirements.

1. Do not sign a supplier's contract. A contract should not be signed without an authorized Procurement Agent's signature per [University Policy 4.2, Transaction Authority and Payment Approval](#). Contact Procurement Services for guidance.
2. Procurement Services has developed unique contracts for services, which included a service provider attestation in place of a service provider evaluation. If appropriate for the service, use one of these unique contracts:
 - a. *Caterer*
 - b. *Addendum for Facility Contract Agreements – use this agreement when a hotel or event venue presents their own contract*
 - c. *Performer without Equipment*
 - d. *Performer with Equipment*
 - e. *Services Provider*
 - f. *Service Provider for Graphic Design, Web Design, Videography*
 - g. *Service Provider for Writing, Editing, Indexing*
 - h. *Service Provider for Photographer, Artist, Illustrator*
3. If the service provider is an entity (i.e., corporation, partnership, limited liability partnership, or limited liability company), use either the *Professional Services Agreement* or *IT Professional Services Agreement*.
4. If the service provider is not an entity (i.e., not a corporation, partnership, limited liability partnership, or limited liability company), the first requirement is to have the service provider complete the *service provider questionnaire*, based upon guidelines established by the Internal Revenue Service, to determine if the service provider should be classified as an employee or an independent contractor (supplier). Call your center or Procurement Services for help.
 - a. Once the questionnaire is returned, complete the *service provider evaluation worksheet*.
 - b. If the service provider is an Independent Contractor, complete the appropriate consulting agreement (consult Procurement Services or your center).
 - c. If the service provider is an Employee, consult your unit's Human Resources department and pay through Cornell Payroll.
5. Consult with Procurement or your service center to select the appropriate contract for service. Work with the service provider to define the scope of work including description of work, deliverables, acceptance criteria, compensation, timing, etc.
6. Submit an I Want Doc and attach the scope of work, service provider questionnaire, service provider evaluation worksheet, and contract.

These contracts for services may be found on the Procurement Services website at <https://www.dfa.cornell.edu/procurement/tools-forms/forms/contracts>.

What Can I Sign?

Authority to execute policies, purchase orders, agreements, equipment leases, software contracts, and all other contracts related to the procurement of goods and services has been delegated to Procurement and Payment Services. The following guidelines apply to contracts:

- Do not sign any supplier's contract. Send it to Procurement Services for review or attach it to an I Want Doc.
- You may sign Cornell's unique contract for services listed in number 2 above.
- You should initial Cornell's professional service agreements (number 3 above) and the independent contractor agreement (number 4 above).

There are other documents that you may receive from a supplier. Please follow the guidelines below:

- Hotel room block agreements - sign
- Hotel reservation confirmations - sign
- Vendor quote – initial only
- Vendor estimate –initial only
- Service agreements – initial only
- Maintenance agreements – initial only

All of these agreements should be attached to an I Want Doc.

Resources

- Policy 3.14, Business Expense - https://www.dfa.cornell.edu/sites/default/files/policy/vol3_14.pdf
- Policy 3.2, Travel Expenses - https://www.dfa.cornell.edu/sites/default/files/vol3_2.pdf
- Policy 3.25, Procurement of Goods and Services - https://www.dfa.cornell.edu/sites/default/files/policy/vol3_25.pdf
- Buying Manual - <https://www.dfa.cornell.edu/procurement/buyers/manual>

Definitions

1. **ASC/BSC/FTC** - Every college and administrative unit is served by one of the eight administrative service, business service, or financial transaction centers.
2. **e-SHOP** – Cornell’s one-stop, web-based “shopping cart” for ordering a full range of frequently purchased goods and services from a select group of vendors. These vendors are registered with the university, have met Cornell’s insurance requirements, accepted Cornell’s terms and conditions, and provided discounted pricing. e-SHOP is integrated with Cornell’s financial system and routes orders to approvers and business service centers for payments.
3. **PCard** – A procurement card is a Visa credit card that may be used for the purchase of business-related goods and services, excluding travel-related items. It is intended for employees whose positions require frequent, small-dollar purchases. Cornell remits the payment directly to the bank for all procurement card purchases, as these cards are a corporate liability card. PCard holders are required to collect receipts/documentation for every purchase. The cardholder automatically receives an email with a link and instructions on how to upload receipts.
4. **I Want Doc** – This web-based request form guides you through four steps to place an order. You fill in as much of the information as you can and click submit. The form is sent directly to your business service center for processing.