

# Research Purchasing and Contracting

10/10/2019

# VA Fiscal Year (FY) October - September

- ⌘ Quarter 1: October – December
- ⌘ Quarter 2: January – March
- ⌘ Quarter 3: April – June
- ⌘ Quarter 4: July – August
- ⌘ You cannot carry money into the next FY. Spend money throughout the current FY. Do not wait until the end of the FY as you may lose the money.

Supply orders \$10,000 and below  
are purchased with a VA purchase  
card

# General Information

- ⌘ Before submitting a purchase request form, be sure the company has the items in stock. If they are not in stock, you need to find out how long it will be before the company has them in stock.
- ⌘ We cannot order back-ordered items. If the company cannot complete the order within 30 days, you need to hold your order and submit it later.
- ⌘ The purchase card limit for a service is \$2500.

# Shipping Costs

- ⌘ The \$10,000 limit for purchase card orders includes shipping cost and other fees involved in the transaction.
- ⌘ On purchase order request forms, include the shipping costs. Please make a separate line item for these charges.



# Returns

- ⌘ Please make sure to write the correct stock numbers on your purchase request forms.
- ⌘ Incorrect stock numbers slow down the order process, and other orders are delayed due to the time required to research the correct stock number.
- ⌘ If you need to make a correction to a submitted order, you need to resubmit your order form. For record keeping purposes, we must have a complete and accurate request.

# Chemicals:

- ⌘ Chemicals and supplies cannot be combined on one purchase request form. They must be separate purchase requests.
- ⌘ John Schaffer, Research Safety Officer must review and approve all chemical purchase order requests.
- ⌘ In the future, this will be done by the medical center Safety Office and will likely add time to the process.
- ⌘ Hence why they should be placed on two separate order forms 😊
- ⌘ Check correct box for “chemical” on order form.

# Animals

- ⌘ Submit requests at least one week in advance to allow for scheduling of transportation.
- ⌘ The order form must be submitted to the animal research facility (ARF) staff to review and approve. They will verify it is in line with the approved ACORP and approved animal numbers.
- ⌘ ARF staff will forward to the purchasing agent once it has been approved.
- ⌘ For planning purposes, you should check with ARF staff regarding specific vendor delivery days.
- ⌘ In order to purchase animals with the purchase card, the total cost including shipping must be less than \$10,000. If above \$10,000, the purchasing agent will need to submit a 2237. You need to allow 4-6 weeks lead time.



# Emergency Order

- ⌘ Keep track of your chemical inventory. Do not wait until you use the last drop. Once the medical center Safety Office becomes involved, we do not know how long it will take to complete orders.
- ⌘ If it is an emergency, note it on your completed purchase request form. Keep in mind, shipping costs maybe higher than the normal shipping cost.
- ⌘ Make sure you plan ahead. ☺ Be careful what you call an “emergency.”

# Common Mistakes:

- ⌘ **Pay Pal:** We are prohibited from using Pay Pal. It is the responsibility of the company to find another way for us to pay, i.e., credit card or check. Or you should use a different vendor. This is a government regulation.
- ⌘ **Vendor Spot** on Purchase Request Form: Make sure you write all of the vendor contact information in this box. If you leave it blank, the request form will be returned to you. This slows down the ordering process.

- ⌘ **Vendor:** If you have never used a certain vendor before, check with budget/ purchasing to verify the vendor is in the VA system.
- ⌘ **Equipment:** Cannot be purchased using a the VA purchase card.
- ⌘ Make sure you are asking the vendor for General Services Association (GSA) pricing.
- ⌘ **DO NOT** send items in for service without letting budget/purchasing know. If you do this, you may have to pay for the service out of your own pocket.

**Equipment Orders are purchased  
by VA Contracting Staff**

- ⌘ Make sure you ask vendors for GSA pricing.
- ⌘ All equipment requests must be accompanied by a quote. Be sure the quote is addressed to the VA, not the university.
- ⌘ Look at the date of the quote. Make sure you are submitting with a substantial amount of time before the quote expires.
- ⌘ If you want to order from a specific company, you will need to submit a Sole Source Justification Form.



- ⌘ All VA purchased equipment must have an EE tag on it.
- ⌘ If your equipment arrives without an EE tag, please let us know.
- ⌘ All equipment purchased with VA funds is the property of the VA.

# Software and IT Purchases

- ⌘ Medical instrumentation, embedded computers and software, and special purpose computing equipment and software may generally be procured using research funding.
- ⌘ IRM will supply basic desktop computers to on-site research labs.
- ⌘ All other IT type items must be purchased with IT money. IT money is limited.

# Contracting

# Most Commonly Used Forms

- ⌘ **Contract Request Package (CRP)**

Be detailed in completing the CRP. Focus on Who, What, Where, When, and How.

- ⌘ **Sole Source Justification (J&A)**

- ⌘ **Statement of Work**

- ⌘ **Market Research**



- ⌘ Notify the Research Office in writing if you would like to stop a contract or place it on hold. Without notification, we could continue to pay invoices.

# Contact Information:

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# Last But Not Least:

- ⌘ Never spend your own personal money and expect to be reimbursed.
- ⌘ All purchase requests must be placed through the research office. We have no mechanism to pay invoices for items or services we did not purchase or authorize.