

**Policy Name: Purchasing Policy**  
**Effective Date: 6/1/2019**  
**Division of Finance and Administration**  
**Departmental Contact:**  
Auxiliary Services Manager

**1. Purpose:**

This policy provides guidance to employees regarding purchases made on behalf of Wingate University. All purchases must follow Federal and State laws as well as University policies and procedures. Employees should refer to the University travel policy for additional information regarding travel-related purchases and arrangements.

**1.1 Policy Statement:**

This policy applies to any employee who makes purchases on behalf of Wingate University. Employees should make purchases using established university direct bill accounts with vendors. Examples include Forms and Supply, Staples, BSN (Athletic Apparel & Supplies), Amazon Business Prime, Spectrum Chemical, and Lowes.

Employees who wish to add a vendor to the list of university direct bill accounts should contact Jenny Walden in the accounts payable office. A W-9 form will be required of the vendor. This form can be obtained from the Purchasing Office website on MyGate under Auxiliary Services. A credit check may be required.

For access to direct bill accounts please contact Jenny Walden ([j.walden@wingate.edu](mailto:j.walden@wingate.edu)) or Rebecca Meares ([rmeares@wingate.edu](mailto:rmeares@wingate.edu)). If an order is over \$1,000 please request a purchase order via Concur.

A Purchase Order (PO) may also be used for purchases. Purchase Orders should be requested in Concur. Open POs are not permitted.

Employees will seek every opportunity as permitted by Federal, State, and University guidelines to obtain the best possible prices for quality items. Exceptions to normal policies may be authorized at the discretion of the Purchasing Manager and/or the Assistant Vice President of Auxiliary Services.

This policy is not intended to cover every possible situation. Special purchasing requirements or items of an unusual nature that are not covered in this policy should be discussed with Accounts Payable. University departments, schools, or other funding sources can establish more stringent requirements than this policy.

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**Policy:**

**2.1 Roles and Responsibilities**

**2.1.1 Purchaser:**

- 2.1.1.1 Verify availability of funds from authorized cost center prior to submitting a purchase.
- 2.1.1.2 Purchase only items authorized and necessary for the performance of the University mission as authorized by the appropriate Cost Center Manager and as permitted according to Federal and State laws, and this policy.
- 2.1.1.3 Employees must ensure/verify personal payment methods from online supplier systems, such as Amazon.com, are not listed when making work-related purchases.

**2.1.2 Approver:**

- 2.1.2.1 The appropriate Cost Center Manager from which funds will be drawn to cover the cost of a purchase is the “approver.”
- 2.1.2.2 Review submitted purchase requests and associated documentation to verify that all purchases are allowable, reasonably priced, of proper quality, necessary for the accomplishment of the University mission, and that necessary funds are available and designated for the requested purchase.
- 2.1.2.3 A cost center manager may not delegate authority for purchase approvals. If a cost center manager is unable to approve the threshold purchase, it will then need to be rerouted for approval to their supervisor. The CCM retains responsibility for ensuring all approved purchases are in accordance with this policy.
- 2.1.2.4 Should an approver not be available to approve a purchase, the request for approval may be advanced to the next level set in the approval tree.
- 2.1.2.5 Review and approve all purchase requests in a timely manner.
- 2.1.2.6 Approve purchases and attesting to the appropriateness of the expenditures.
- 2.1.2.7 Operate within his or her approved budget limits for the budget year within which the purchase is being authorized.

**2.1.3 Accounts Payable**

- 2.1.3.1 Accounts Payable is responsible for processing payments to preferred suppliers for goods/services made on behalf of the University. It is the department's responsibility to make

sure that vendor invoices are sent to the business office in a timely manner with appropriate approvals to ensure on-time payment.

## **2.2 Account Reconciliation**

Cost Center Managers are responsible for ensuring all accounts within his or her division, department, or office, are reconciled on a weekly, monthly, and annual basis. Do not spend money you do not have.

## **2.3 Approvals**

2.3.1 Approvals are made by Cost Center Managers prior to the expenditure of University funds.

2.3.1.1 Approvals must only be authorized after verification of available funds from the appropriate cost center from which the approver has permission to spend.

2.3.1.2 Department Heads (Cost Center Managers) must approve all purchases up to \$999.

2.3.1.3 Purchases in amounts between \$1,000 and \$4,999 must be approved by the appropriate Vice President/Vice Provost.

2.3.1.4 Purchases in amounts between \$5,000 and \$9,999 must be approved by the appropriate Senior Vice President/Provost

2.3.1.5 Purchases in amounts \$10,000 and above must be approved by the Vice President of Finance or the Senior Vice President for Finance and Administration.

2.3.2 Once the purchase request has been approved the purchaser may place an order.

2.3.3 Purchases may not be split to avoid or circumvent authorized approval thresholds.

## **2.4 Supplier Issues**

Delivery of incorrect or damaged products is the responsibility of the supplier. Purchasers should contact the supplier-customer support.

## **2.5 Non-WINGATE UNIVERSITY Employee Purchases**

Non-University employees are not authorized to make purchases on behalf of the University.

## **2.6 Information Technology (IT) Purchases**

Computers must be procured through the IT department. Computers are generally procured as part of an annual lease agreement. The requesting department must anticipate and budget for computer refreshes and computer purchases for new employees.

## **2.7 Gifts and Prizes**

2.7.1 University resources are not authorized to purchase or otherwise obtain gifts, gift cards, prizes, or giveaways for specific employees or students. Prizes for drawings are acceptable.

Any prizes for drawings over \$100 must have written notice from the recipient that the prize was received. Prizes/Winnings over \$600 require a 1099 Form.

2.7.1.1 University Admissions and College, School, Department, or Program recruiting staff may

use University resources specifically approved in the budget for the purpose of admissions and recruiting to purchase recruiting related items and may give these items to prospective students.

## **2.8 Requisitions for Purchase Orders**

2.8.1 Requisitions for purchase orders (PO) must be submitted for items that have been pre-approved for purchase using the University SunTrust Purchasing Card. Requisitions for POs must be completed prior to the purchase. POs should be requested in Concur. Open POs are not permitted. Sequential approvals may be required based approval thresholds outlined below:

2.8.1.1 Department Heads (Cost Center Managers) must approve all requisitions up to \$999.

2.8.1.2 Requisitions in amounts between \$1,000 and \$4,999 must be approved by the appropriate Vice President/Vice Provost.

2.8.1.3 Requisitions in amounts between \$5,000 and \$9,999 must be approved by the appropriate Senior Vice President/Provost.

2.8.1.4 Requisitions in amounts \$10,000 and above must be approved by the Vice President of Finance or the Senior Vice President for Finance and Administration.

2.8.2 Once the Accounts Payable Office receives the requisition, a PO will be processed.

2.8.2.1 The department/person requesting the purchase will be notified when the PO is processed, at which point the department/purchase requester must either hand deliver or mail/fax/scan the PO to the vendor.

For additional information please contact the Purchasing Office at 704-233-8739.

### **Auxiliary Services Manager**

**Approved by:** *Cameron L. Jackson*

**Date:** 1 June 2019