

WEST VIRGINIA UNIVERSITY AT PARKERSBURG

**Purchasing Department
300 Campus Drive
Parkersburg, West Virginia 26104**

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This handbook has been designed and promulgated to ensure the smooth and proper flow of procurement, shipping/receiving, inventory control, and purchasing card procedures are followed and meet all regulations as set forth by the West Virginia State Purchasing Division and the West Virginia Higher Education Policy Commission.

Instruction and guidelines contained herein apply only to procedures at West Virginia University at Parkersburg. Final authority on all purchasing regulations applying to this institution will be governed by the regulations promulgated by the West Virginia Higher Education Policy Commission.

Questions concerning any area of purchasing, procurement, inventory control, central receiving and the purchasing card program should be referred to the WVU Parkersburg Chief Procurement Officer at (304) 424-8263 or via email to <mailto:wayne.riley@mail.wvu.edu>

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West Virginia University at Parkersburg

(Updated January 2008)



**West Virginia University
at Parkersburg
Purchasing Department**

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I. OVERVIEW

West Virginia University at Parkersburg maintains a centralized purchasing department and centralized shipping and receiving function to assist with the acquisition of goods, services, agreements, and other purchasing requirements. Functions include purchase, receipt, delivery, inventory control, and oversight of the college purchasing card program.

- The purchasing department is a service oriented agency with a primary responsibility for buying products of the proper quality at the right time, in the proper quantity at an economical price from a responsible vendor. The department exists to assist all users and is solely geared toward customer service.

II. REQUIREMENTS

The West Virginia State Code provides the Higher Education Policy Commission with the authority to effect purchases of materials, supplies, equipment, services and printing for the State's public institutions of higher education. The Commission is also authorized to set purchasing policies, prepare rules and regulations as delegated and therefore prescribed by the Commission. West Virginia University at Parkersburg purchasing department adheres to these regulations to insure the fair and equitable treatment of all persons who may utilize the procurement system at this institution. These regulations may also require competitive bidding and establishes guidelines identifying specific dollar limitations that may apply and the type of bidding procedures that will be utilized.

The Chief Procurement Officer (Director of Purchasing), appointed by the president, is responsible for implementation of State regulations in the procurement of goods and services for the institution.

- **Encumbrance of Expenditures:** State Code requires that all expenditures be made within limits of available appropriated funds.

There are generally three types of funds available for use:

1. State Appropriated
2. Federal Grants
3. State Special Appropriated

Each of these funds have unique characteristics which include expiration dates and spending restrictions. These characteristics may govern purchasing practices as necessary.

- **Eligible Vendors:** In accordance with Chapter 18, Article 26, Section 10F of the West Virginia State Code, every person, firm, or corporation selling goods or services to State agencies, competitive bid or otherwise, must complete and file a Vendor Registration and Disclosure Statement (Form WV-1) with the State purchasing division. A vendor is required to register only one time. However, if the ownership of services offered for the organizational structure changes, the vendor must update the original registration by submitting a new registration form. In some instances, depending on the dollar value of the initial purchase, a \$45 fee is attached. (Higher Education has been exempted for most portions of this Code item.)

When registering, the Federal Employee Identification Number (FEIN) of the firm or partnership must be provided. If the registrant is an individual, Social Security Account Number (SSAN) must be provided in lieu of the FEIN. Form must be completed, signed, and filed with the State purchasing division. It may be submitted to the WVUP purchasing department who will forward to the State office.

- **Resident Vendor Preference:** Those vendors who qualify for a resident vendor preference may receive an award preference over a non-resident vendor provided that:
 1. The purchase order is based on competitive bids
 2. The bid of the resident vendor does not exceed that of a non resident vendor by more than 2 ½% allowed by law.
 3. Claim for such a preference must be made in writing by the vendor at time of bid submittal.

- **Unauthorized Purchases:** A purchase made without prior approval from the procurement officer or his/her designee is an unauthorized purchase and may become the personal responsibility of the individual making the purchase. The Chief Procurement Officer is the only person authorized by the West Virginia Higher Education Policy Commission through the institution president to enter into and administer contracts and make written determination with respect thereto for WVU Parkersburg. This restriction applies to ALL goods and services, including requests for previews, memberships, subscriptions, maintenance calls, etc. The Chief Procurement Officer may delegate this authority to authorized purchasing card holders at the institution within the individual limits of their purchasing card. However, final review of the purchases still rests with the Chief Procurement Officer.

III. PURCHASING PROCESS

The purchasing process begins with the department or individual having a need for goods or services. The first step in all types of purchasing transactions is the preparation and transmittal of a purchasing requisition to the purchasing department. This form is used for purchasing card purchases, purchase orders, contracts, etc. Large dollar procurements, those in excess of \$25,000 require competitive sealed bidding.

- **Requisition:** Preparation of the form is self explanatory. All requisitions must be fully completed with proper budget account information and signed by the individual having budget authority over the noted account. The requisition form may either be emailed to the purchasing department at wvupurchasing@mail.wvu.edu or hand delivered.
- **Writing a Specification:** Specifications are always prepared by the requestor, although assistance is always available from the purchasing department. Specifications determine the quality level and basis for evaluation of bids. On repeat requisitions specifications should be reviewed in order to ensure they do not become static. If the order is for items with special qualities or requirements ensure the specification clearly identifies this

need. A properly prepared specification should be a combination of a legal document and a technical paper.

The following guidelines should be used in obtaining the specification for your order.

1. Identify the minimum requirements necessary to accomplish the task.
 2. Allow for competitive bidding. Do not be restrictive by writing out certain brands or manufacturers. (See section on sole-source procurement). Functional or performance criteria must be emphasized when writing specification.
 3. List criteria on which testing will be judged for compliance with the specification.
- Although the specification must be written to allow competitive bidding, this does not guarantee that low bid will automatically always be accepted as the selected vendor. Items provided on returned bids that are below the minimum designated standards outline within the specification may be rejected based on that basis. It is therefore important that specification establishes a minimum acceptable quality.
 - Specification must be clear and concise as an award is normally based on the exact justification and documentation contained in the specification. Specification writer should also ensure that all known pertinent characteristics of items required be identified to enable proper evaluation of any alternatives bid or quoted.
 - Specification sources are varied and can often be found in:
 1. catalogs
 2. from vendors (see following paragraph)
 3. technical societies
 4. association of users manufacturers
 5. purchasing office
 - Specification writers must be very careful when obtaining draft specifications from vendors that no inference is made to the vendor

that he or she will be awarded any contract for which they may draft such specification.

- Since no individual can be expected to be a technical expert in all areas, the purchasing office often “buys” technical specifications from recognized experts and adds the “boiler plate” documents prior to releasing for bid. Prior to release the purchase specification is also carefully examined to ensure that it does not preclude certain vendors from responding to the bid package.

IV. TYPES OF PROCUREMENT

There are two authorized methods of procurement for various types of goods and services based on dollar threshold that pertain to purchase orders. (Purchasing card procurements as well as other procurement instruments will be addressed elsewhere in this manual.)

- Purchases under \$25,000: All orders less than \$25,000 do not require competitive bidding by State regulations as amended for Higher Education. However, requisitioners must ensure they not artificially divide requisitions in order to avoid bidding dollar thresholds. This practice is commonly referred to as “split purchasing.” Should it be in the best interest of the agency the purchasing office does have the right to obtain competitive quotes for any order, regardless of dollar value. This is especially critical when the purchasing office feels a quote obtained by a requisitioner is unusually high.
- Purchases over \$25,000: Nearly all purchases in excess of \$25,000 require formal bidding. In addition to receiving sealed bids, the specification must be posted either electronically on the WVUP purchasing department website or on the public bid board located in the main hallway outside the business office. A legal ad placed in the local newspaper at least 14 days prior to bid opening is also required by state law. These steps allow for the widest dissemination of the bid package to potential vendors.

Along with the mailing of the bid package to potential bidders will be a self-addressed envelope for the return of the bid/quote. Returned bids will only be accepted if returned in a sealed

envelope or container with the bid or quote number clearly marked on the outside. In addition, the bid envelope must contain the date and time of the bid opening as well as the bid number. Upon receipt in the purchasing office the sealed bids will immediately be date-stamped on the external envelope to show time and date of receipt. Bids are then placed in a secure location until date and time of public bid opening.

At opening all bids will be opened one at a time and read aloud and the information transcribed to a bid abstract form. All bid openings are open to the public. Upon completion of the bid opening each bid will be reviewed for completion and correctness and then forwarded to the initial requisitioner for evaluation. With all things considered equal and all bidders meeting specification requirements, award will normally be made to the lowest proper bid. Should the requisitioner select a vendor other than low bid then complete written justification must accompany the bid package when returned to purchasing for award. – It is extremely rare for the purchasing office to make an award to other than low bidder.

Selected vendor will be notified of the results through receipt of a signed order. Unsuccessful bidders will be notified either by phone or a letter of the bid results.

Contract Purchases: Contracts are to be used to the maximum extent possible. Types of contracts that may be used include formal State negotiated contracts, other State agency contracts, other college or university contracts, WVU Parkersburg contracts and government/GSA contracts that allow this agency to use. The advantage of contract use are guaranteed pricing for a specific time frame and the freedom to issue an order or award without going through the formal bidding process. Contracts are specifically useful in repetitive ordered items such as welding gasses and supplies, etc.

Agreements: Agreements are utilized when the college is acquiring technical assistance or entering into contracts with private individuals for such things as the teaching of special non-credit courses through the Corporate and Community Education area,

entertainers, preceptors, or student teacher advisors for our education majors, to name just a few. All agreement forms must be original and contain minimum information which will include full name and address of vendor or individual, FEIN (Federal Employee Identification Number) or SSAN (Social Security Account Number), type of service provided and original signature. An updated W-9 tax form must also be on file. ALL agreements will be approved by the WVU Parkersburg Director of Purchasing/Chief Procurement Officer. Departments DO NOT have the authority to enter into agreements beforehand.

Sole Source Purchases: Sole source purchasing over \$25,000 will rarely be used by the purchasing department. Only when absolutely certain that specific goods and services can only be procured from only one vendor will a sole source purchase be authorized. Please note that a requirement for a particular proprietary items does not in itself, justify the need for using a sole source order. The following examples are provided where sole source may be justified:

1. accessories or replacement parts for existing equipment
2. where a sole source item is needed for trial use or testing
3. grant funding specifically requiring the use of a particular brand name or vendor (grant writers should try and avoid being locked into this situation when applying for grants)

The determination for using sole source award rests with the Director of Purchasing/Chief Procurement Officer. Such determination must be documented in writing in the order file. Should any questions arise about the need for use of sole source, the decision of the Director of Purchasing will be final. Any request by a requisition initiator to award a sole source order must be requested in writing and attached to the requisition. The request must full and completely justify the need for sole source to the satisfaction of the Director of Purchasing.

Emergency Procurement: Emergency purchases may be authorized by the Director of Purchasing when there is a threat to public health, welfare, or safety, or to meet bona fide emergencies arising from unforeseen causes such as natural disasters, acts of God,

strikes or work stoppages, and delays in transportation provided such emergency purchases shall be made with competition as is practical under the circumstances. Emergency purchases will be limited to those supplies or services only necessary to meet the emergency. In all instances the purchase order file will be documented with written justification as to the need for an emergency purchase. All emergency purchases should be referred to the Director of Purchasing for determination if possible and time permits.

Proposals: The competitive Request for Proposals (RFP), is available for use as a method of procurement when sealed bidding is neither practical nor advantageous. A RFP is an invitation to vendors to submit a proposal to solve a problem when the purchaser is unsure of the solution. The RFP requisition must fully identify a detailed description of the problem and any specific mandatory elements considered essential to the solution, as well as any other elements that may impact the service to be received. However, RFP must not contain any information that will restrict other vendors from providing the same type of service or solution or from participating in the purchasing process.

The key element in determining the use of a RFP is the need for flexibility. RFP procurement process differs from sealed bidding in two important ways:

1. It permits discussions with competing suppliers
2. It allows comparative judgment evaluation to be made when selection is among acceptable proposals that will be the ultimate basis for an award

Evaluation of all RFP's must be based on the evaluation factors set forth with the RFP and provided to all vendors as part of the proposal package.

Maintenance Agreements: All requests for maintenance agreements for equipment are to be submitted to the purchasing office for award. Make, model, serial number, state inventory tag number (if applicable), and any other pertinent information must be provided. Payment for maintenance services are only made in

arrears and after the services have been performed. If stated in the agreement, payments may be made periodically as maintenance is performed.

Open End Contracts: The procedure for purchasing various commodities and/or services from one vendor for an extended period of time may be authorized through the use of an open end contract. Annual requirements are established and the sealed bidding process is used. An annual contract will be awarded with the options for renewals. Funds will only be encumbered for one year at a time.

Special Purchasing Situations: Nearly all purchases of goods or services require delivery prior to payment of invoices. However, a few certain situations do exist when advance payment may be authorized prior to receipt of items. They are as follows:

1. subscriptions
2. approved memberships
3. postage
4. purchasing card orders

Purchasing Card: The purpose of the State of West Virginia Purchasing Card program is to establish a more efficient, cost-effective method of purchasing and paying for small dollar transactions within established usage limits and guidelines. The program is designed to replace small purchase orders with a value of \$25,000 or less. (Please note that dollar limit of individual cards is set by the Director of Purchasing.)

The purchasing card may be used for in-store purchases, telephone, fax orders, and online internet orders.

All cards are issued at the request of an individual's direct supervisor or the Agency Card Coordinator (ACC), who is the Director of Purchasing. Card usage will be continually audited and can be rescinded at any time deemed necessary by the ACC.

Record keeping is essential to ensure success of the program. As such, all receipts, documentation, etc., must be turned into the

purchasing office within 24 hours of the purchase for inclusion in the respective card-holder's monthly file.

As a card holder, the named individual has no personal liability associated with legal purchases. Therefore, use of the purchasing card will in no way affect an individual's personal credit history. But remember, the card is in an individual's name and this responsibility must be taken seriously.

No single transaction may exceed the \$25,000 limit as established by State law and amended for the Higher Education Policy Commission. As noted above, individual card holders may have lower transaction limits set by the ACC. The per transaction amount limit must take into consideration shipping, freight and any other associated costs with the purchase.

When encountering a vendor who does not accept the purchasing card please notify the purchasing department as soon as possible. State law requires that we use vendors who accept the card to the maximum extent possible. If vendor continues to not accept the purchasing card we may be forced to use other merchants.

Acquiring a Card: Only full time employees of the institution designated by their supervisor or the ACC may be permitted to obtain a card for official use. To obtain a card an applicant must complete an on-line training program provided by the State of West Virginia Auditor's Office. Upon completion of the training the applicant will present the ACC their certificate of completion. A card will then be requested upon completion of the full application form and cardholder agreement form. Upon receipt of card it must be presented to the ACC for activation. **Do not try and activate the card yourself – regardless of the sticker placed on the card by the issuing bank.**

Cardholder Responsibilities: As a cardholder the individual agrees to comply with the terms established by this program as provided to you.

Cardholder agrees to make only official WVU Parkersburg purchases only.

Cardholder agrees to return the card to the ACC upon termination of employment at the college or upon request by the ACC.

Cardholder should notify the ACC immediately upon discovery of a lost or stolen card. ACC will arrange to have card cancelled and a new card issued.

Under no circumstances should a card holder ever allow another individual to use their card. This is a violation of State law.

Misuse of Card: The following situations are considered “misuse” of the purchase card:

1. using the card for personal purchases
2. inappropriate control over the card
3. failure to forward receipts to the business office in a timely manner
4. violation of the State guidelines established for the program

Consequences of Misuse – forfeiture of card and/or disciplinary action as outlined in WV CODE 12-3-b as noted below.

Fraudulent or unauthorized use of purchasing card is prohibited; penalties.

It is unlawful for any person to use a state purchase card issued in accordance with the provisions of section 10-A of this article to make any purchase of goods or services in a manner which is contrary to the provisions of section 10-A of this article, or the rules promulgated pursuant to that section. Any person who violates the provisions of this section is guilty of a felony, and upon conviction thereof, shall be confined in the penitentiary not less than one, nor more than five years, or fined more than five thousand dollars, or both fined and imprisoned.

Audits: To ensure the continued success of this program, periodic audits will be conducted on cardholder’s accounts to ascertain items billed to the card have been received and proper policies are

being followed. These audits may be conducted by both internal and external entities such as the ACC and the State of West Virginia Auditor's Office

Making a Purchase: The card may be used to purchase items in person at the vendor's location, by telephone, by fax, or by other electronic means such as internet.

Upon completion of the purchase the cardholder must complete a purchase requisition as with any other purchase and present it immediately to the purchasing department for entry into the cardholder's monthly log sheet. Attached to the requisition must be any receipts or other documentation pertaining to the procurement. If items have been ordered but not yet received, the requisition must still be prepared and sent to purchasing immediately. Upon receipt of items, all receipts and paperwork must then be forwarded to purchasing.

Tax Exemption: WVU Parkersburg is a tax exempt organization. The tax exempt number is on each individual purchasing card. Cardholders must ensure that all vendors are aware of this status at time of purchase. If you find you have been charged tax you must contact the vendor immediately and ask for a credit to your account for the amount of tax charged.

Prohibited Transactions: The following types of transaction are not permitted under the purchasing card program.

1. alcoholic beverages
2. tax reportable services 1099
3. weapons
4. temporary help
5. legal services
6. cash advances

Disputed Charges: If a dispute concerning erroneous charges, disputed items, returns, etc. arises, attempt to resolve directly with the vendor. If unable to resolve, notify the ACC immediately. All disputes, whether resolved by the cardholder or not must be brought to the attention of the ACC.

Returned Items: Items purchased in person should be returned directly to the supplier by the cardholder. The cardholder is responsible for ensuring the vendor issues a credit slip. This documentation must be given to the ACC immediately for inclusion into the cardholders monthly log.

Items ordered via phone, fax, or internet requiring return should be coordinated with the vendor for return authorization. The cardholder must request a credit be issued for the returned items. This credit slip must be presented to the ACC immediately for inclusion in the cardholders monthly log.

Purchasing Office Responsibility: The purchasing office will assume responsibility for verifying all charges on all purchasing cards. Each purchasing card is tied to a default budget account, usually the departmental budget of the cardholder. Each day the purchasing department reviews individual card charges on the issuing bank's website. Therefore it is extremely important for the cardholders to provide the necessary documentation to support the purchase to the purchasing office. This is not only required for audit purposes, but also tells the purchasing office which budget the purchase should be charged to if other than the default account.

At the end of each month the ACC will print out a monthly activity report for each card downloaded from the bank's website. It will be reviewed and signed by the cardholder verifying its accuracy and then filed in the monthly folder for audit purposes.

V. SHIPPING AND RECEIVING

Shipping and receiving is one of the most important functions in the procurement process. Improper receiving procedures undermine the effort expended in the specification, bidding, and ordering phases of purchasing.

In most instances the purchasing department will forward a receiving copy of each purchase order/credit card order to central receiving as soon as item(s) are ordered. Exceptions will be confirmation orders which will be prepared and then immediately signed off by the

purchasing department and forwarded to accounts payable for processing.

- Receiving Procedures: Upon arrival of carrier at the central receiving loading dock the following steps will be taken:
 1. Obtain shipping paperwork from the carrier driver
 2. Pull the corresponding purchase order/credit card pending order copy from the suspense board
 3. Match items listed on the order to items received for the following criteria:
 - a. make, model number, brand name, general description of the items
 - b. quantity ordered versus quantity received
 4. Items received should be visually inspected and matched against pending order copy (do not check items in solely by verifying the enclosed packing list – packing lists sometimes do not accurately reflect what is in the container)

- UPS/Fedex Shipments: The majority of the shipments WVUP receives arrive via UPS or Fedex at an established time each day. We also ship outgoing WVUP packages via both of these carriers.

- Personal Shipments: The WVUP shipping and receiving department will assist college personnel with outgoing shipments. All shipments must be delivered to the shipping and receiving department packaged, ready for shipment. Shipments will be made via Fedex only and a valid credit card must be provided at time of shipment. All shipments will be paid by personal credit card. (We no longer are authorized to ship personal items at college expense and have the individual reimburse for the cost.)

- Damaged Shipments: From time to time an order will be received in a damaged condition. If the outside container shows obvious damage the shipping and receiving department will make a determination whether or not to accept the shipment. If accepted, the shipping documents **MUST** be annotated with the outside container damage. If no obvious damage is noted on the

container but internal damage is found after carrier departs, shipping and receiving personnel must make note on the receiving copy of the order and notify the vendor immediately. Pictures should also be taken if possible. Shipping and receiving will work with the vendor to replace the damaged items or seek reimbursement.

- Clearing Orders: All orders, whether via purchase order or by purchasing/credit card will generate a “pending” or suspense copy of the order. Once the order has been received the pending copy of the order will be pulled and checked against the contents of the shipment. Items will then be delivered to the requisitioner who will sign the pending copy of the order showing department receipt. If a purchase order the shipping and receiving department will then receive the order in the Oracle system and transmit the receipt to accounts payable for matching against the invoice and ultimately payment. If a credit card order the completed paperwork will be filed in the appropriate monthly credit card file for audit review as necessary.
- Partial Order: From time to time during check-in of received items it will be found that the order is only a partial. When this situation arises, the shipping and receiving department will annotate on the pending order which items have been received and the date. The order is then placed in a “pending” order file and will not be fully cleared until the remaining items have been received.
- Inventory Control (Receiving Responsibility): All items received with a cost of \$5000 or greater will be tagged for inventory control purposes. Other items considered highly subject to pilferage or theft may also be tagged at the discretion of the Director of Purchasing, although they will not be entered into the inventory control computer system.
 1. Notate on the receiving copy of the purchase order the inventory tag number, serial and model number of the item
 2. A copy of the receiving copy of the order for tagged items showing the tag number will be delivered to the purchasing

office immediately for input into the inventory system. “Original” copy will be given to the accounts payable section (if ordered on a purchase order) as the receiving report for matching against the invoice.

- Expediting Shipments: Occasionally pending orders become overdue and/or are urgently required by the requisitioner. If this situation arises the shipping and receiving department will assist the purchasing office in expediting the order in order to speed up the delivery date.
 1. Upon a periodic review of all outstanding purchasing/credit card orders and when an order appears to be past due (normally 30 days after order date), contact the vendor via telephone or email to determine the status of the order. ALL comments from the vendor regarding the status of the order must be noted on the receiving report copy.
 2. Notify the department initiating the requisition of the most recent status once obtained from the vendor.
 3. Any problems not easily handled by the shipping and receiving department should be brought immediately to the attention of the Director of Purchasing who will then make the determination on the continued status of the order.

VI. VENDORS

In accordance with regulations and acceptable procurement standards, West Virginia University makes every effort to treat all vendors equally and fairly.

- Vendor Stipulation: The following stipulations apply to all vendors doing business with WVUP and will be strictly enforced:
 1. WVUP employees shall not have a financial interest in the purchase of equipment, materials, supplies or other goods and services from the vendor.
 2. Employees of WVUP shall not accept any gift, or other items of value from any firm or corporation in excess of what is authorized within State Code pertaining to ethics. Under no

circumstances should employees accept any items of any value from vendors seeking favor with WVUP in regards to the procurement process.

- Sales Representatives: Many vendors call on the purchasing office staff through their outside sales reps. Although the vast majority of these reps are legitimate, discretion must be used since their purpose is solely to garner business for their respective firms. As such, bids from competing vendors are never to be discussed with sales reps. (Note that after a formal bid opening takes place the files become public and the bidding information must be made available to anyone who seeks to review the procurement file.) Only information in bids clearly marked “proprietary” by the bidders is not subject to public review.
- Vendor Complaint Form: A vendor complaint form is a written record of problems that have arisen from a vendor. This documentation can take any written form deemed necessary for the Director of Purchasing and must be attached to the applicable purchase order file. This process is normally only used as a last resort and when a vendor repeatedly fails to meet its obligations to WVUP as stated in the order. Actions can range from suspension from doing business with WVUP to a written letter of dissatisfaction listing the complaints.

VII. INVENTORY CONTROL

The scope of Inventory Management and Surplus Property is to provide guidelines on inventory management and surplus property disposition. Authority to implement these guidelines is granted to West Virginia University at Parkersburg Director of Purchasing/Chief Procurement Officer by the State Purchasing Division as outlined in Chapter 5, Section 34 and 45 of the West Virginia Code. Action has further been delegated to the purchasing department inventory coordinator.

- Inventory Management: All State owned property, whether fixed or removable, having a value of \$5000 or more will be

maintained and tracked in the fixed asset module of the Oracle system. Adding items to this listing if meeting criteria is automatic at time of receipt. Once “tagged”, an Oracle Asset Acquisition form is completed by the purchasing department and forwarded to WVU main campus for entry into the Oracle system to complete the fixed asset listing entry.

- **Tagging:** Upon receipt of an item to be added to the fixed asset listing, the shipping and receiving department will immediately place an inventory control tag on the equipment/item. The serial and model number of the item, as well as the inventory control tag number will be entered on the receiving copy of the purchase order and a copy provided to the purchasing department inventory control clerk. The purchasing department will then prepare the Oracle Asset Acquisition form as noted in the paragraph above.
- **Inventory:** As authorized by the West Virginia Code and further delegated to the Higher Education Policy Commission, a physical inventory will be conducted every other year. This physical inventory should be conducted by June 30th of the year in which due and will consist of actual hands-on sight of the items noted on the fixed asset listing as provided by WVU main campus via Excel spreadsheet from the Oracle fixed asset module. Upon completion of the physical inventory, notification will be made to WVU main campus via Excel spreadsheet as to the status of the inventoried items. WVU main campus will report the results of the regional campuses inventory along with theirs to the Policy Commission.
- **Lost Property:** When fixed assets identified during the inventory have been determined to be lost an investigation will be initiated with the custodian of the property and then turned over to the campus Police department if applicable for follow-up. Once the investigation is complete, the Oracle Disposal/Surplus form will be prepared and forwarded to WVU main campus to have the item deleted from the fixed asset Oracle module.

- Stolen Property: Property determined to be stolen will be reported to the campus Police department and the local law enforcement authorities having jurisdiction. The same procedures as noted above for lost property will then be followed.
- Property Disposition: From time to time WVUP will make the determination to retire and therefore dispose of items on the fixed asset listing. All property retired will be reported to WVU main campus in the same method as lost or stolen property in order to remove the items from the fixed asset listing. The purchasing department inventory clerk will also prepare WV State Form WV-103, Surplus Property and Disposition form to remain in the property file for audit purposes.
- Property Disposal: There are several methods authorized for WVUP to dispose of excess fixed asset items (as well as items under \$5000).
 1. Surplus items may be listed and then transferred to the State surplus property yard at Dunbar, West Virginia where they will be sold and receipts kept by the State.
 2. WVUP may transfer excess assets to other government agencies, including federal, state, county and municipal entities. Under no circumstances will items be permitted to be transferred to private companies or individuals.
 3. Excess items may be advertised in the local newspaper for sealed bidding. The individual submitting the highest bid will be allowed to take possession of the items once payment has been made. Records must be maintained with copies of the legal ad, the name of the bidders, the name of the high bidder and the amount paid.
 4. If the Director of Purchasing determines the fixed asset items has no value then they may be disposed of locally. This method of disposal will only be allowed once the item has no resale value.

