POLICY

Manual Requisitions are for use only by offices which do not have OneSource access. For OneSource users, refer to the OneSource Procurement/Accounts Payable Manual.

A requisition must be submitted for all commitments to purchase goods or services. For contractual agreements, see also “Contract Voucher Request”: Section 2.11.2. For consultant/honorarium agreements, see also “Consultant/Honorarium/Independent Contractor”: Section 2.11.3.

PROCEDURES

1. The form “Requisition to Purchasing Department” (Appendix 2.11.1.A) is used as a request for Materials Management to issue a purchase order for goods or services or to pay for goods or services already rendered.

2. The requisition is a four-part form distributed as follows:

   - WHITE ORIGINAL............ Accounts Payable or Materials Management
   - YELLOW ............................ Materials Management
   - PINK ................................... Divisional Business Office
   - GOLDENROD .................... Requisitioner

3. The completed requisition is approved by the appropriate departmental personnel and sent to the Divisional Business Office for approval.

4. The Divisional Business Office reviews the requisition for the following:

   - Appropriateness of expenditure
   - Budget availability
   - Required signature approvals
   - Validity and appropriateness of general ledger account numbers
   - Accuracy and completeness of the requisition

5. Incorrect requisitions are returned to the department with an explanation to enable the department to respond appropriately.
6. The Divisional Business Office retains the pink copy of the requisition as proof of request and is to be matched to the goldenrod copy of the Purchase Order if one is issued.

7. The approved requisition is forwarded to Materials Management.

8. Materials Management reviews the requisition for accuracy and completeness. The requisition is then reviewed to determine what type of goods or services need to be ordered or have already been ordered/rendered.

   a. If the request is for non-tangible items or services such as employee reimbursement or for a consultant/honorarium the requisition is sent directly to Accounts Payable for payment.

   b. If the goods or services are tangible assets that have not yet been ordered, the appropriate Materials Management buyer contacts the vendor, edits the requisition as needed and places the order. The buyer issues a Purchase Order for the goods or services requested.

NOTE: Multiple requisitions for the same vendor can be combined to form a single Purchase Order.

NOTE: The Materials Management Department and the Financial Services Department maintain lists of authorized Divisional Business Office signers. Any revisions to authorized signers must be communicated in writing to both departments.

In those instances where requisitions must be signed by other personnel prior to approval by the Divisional Business Office, (i.e., Appropriate Departmental Representative, Grant Principal Investigator); it is the department's responsibility to obtain these signatures.

The Materials Management and Financial Services Departments are responsible only for verifying that the requisition has been approved by an authorized Divisional Business Office representative.
INSTRUCTIONS FOR COMPLETION

1. **Firm (Vendor)**

   Name of the company or individual to be used if known. If unknown or no preference, enter "Best Source" and Materials Management will determine the vendor based on price, time and quality considerations. Materials Management may be precluded from ordering from a specifically requested vendor. In this case, the requisitioning department is notified before the order is placed. If a particular vendor is preferred, a "Justification For Sole Source Purchase" (Appendix 2.10.4.A) form must accompany the requisition.

2. **Address**

   Vendor address if known.

3. **Date**

   Date of requisition.

4. **P.O. No.**

   Leave blank. Materials Management enters the purchase order number if one is to be issued. For Reserve Purchase Orders the requisitioner enters the Reserve Purchase Order number issued by Materials Management.

5. **Page ___ Of ___**

   Page of requisition versus the total number of requisition pages.

6. **Department**

   Full name of the department making the request.

7. **Deliver To**
Complete address, individual and telephone number of the location where the goods and/or green copy of the completed Purchase Order are to be delivered. Be as specific as possible.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td><strong>Item No.</strong></td>
</tr>
<tr>
<td></td>
<td>Number requested items sequentially. This space is not for the descriptive part number of an item.</td>
</tr>
<tr>
<td>9.</td>
<td><strong>Quantity</strong></td>
</tr>
<tr>
<td></td>
<td>Quantity and unit measure of each item requested.</td>
</tr>
<tr>
<td>10.</td>
<td><strong>Description of Items</strong></td>
</tr>
<tr>
<td></td>
<td>Description of requested items. Be as specific and detailed as possible. Include description part numbers here. The clearer the description, the easier it is for Materials Management to order correctly. If the items are already ordered and/or received please add &quot;Confirmation Only&quot; to the last item description. If the item is seen in a catalog, you may attach a copy of the catalog page to the requisition.</td>
</tr>
<tr>
<td>11.</td>
<td><strong>Unit Price</strong></td>
</tr>
<tr>
<td></td>
<td>Price of one unit of the requested item.</td>
</tr>
<tr>
<td>12.</td>
<td><strong>Total</strong></td>
</tr>
<tr>
<td></td>
<td>Multiply the price of one unit times the number of units ordered and enter the total cost for all units of each requested item. Every requisition must have a price entered. If cost is not known, enter an estimate. Materials Management provides cost estimates upon request.</td>
</tr>
<tr>
<td>13.</td>
<td><strong>General Ledger Account Number</strong></td>
</tr>
<tr>
<td></td>
<td>General ledger account number to be charged. Use the Medical School’s printed Chart of Accounts.</td>
</tr>
</tbody>
</table>
14. **Specific Instructions**

This area is used for specific comments or requests to the Materials Management Department. An example would be to indicate that the container must be opened and inspected by either a technician, supplier or end user. (See Receipt of Goods.)

15. **Requisition Signed By**

The requisitioner signs here and enters the date signed. The requisitioner is the contact person for questions concerning the requisition.

16. **Appropriate Departmental Representative**

The authorized signer for the department and/or grant approves the requisition with their signature and the date signed.

17. **Divisional Business Office**

The authorized signer for the Divisional Business Office approves the requisition with their signature and the date signed.
POLICY

The Contract Voucher Request is used when a contract requires fixed payments on a predetermined payment schedule. Examples for using this form are stipends, leases and rent for which the Medical School does not normally receive a monthly invoice (see also “Maintenance Contracts”: Section 2.11.7).

Contract Voucher Request forms are valid for the entire contract period. New Contract Voucher Requests are not required for each fiscal year.

Note: If the contract is cancelled, the department must notify the Divisional Business Office and Accounts Payable immediately.

A reminder letter will be sent by Accounts Payable to the Divisional Business Office at the end of each fiscal year outlining contract vouchers in effect for the upcoming fiscal year. Nothing will need to be done for Contract Voucher Requests that overlap fiscal years unless it is to be cancelled. If the contract is to be cancelled, the department must notify the Divisional Business Office and Accounts Payable immediately.

PROCEDURES

1. For OneSource users, refer to the OneSource Procurement/Accounts Payable Manual.
   
   Contract Voucher Request should be entered in OneSource. Simply create requisition as usual. In the line description, be sure to indicate that it is for monthly set payments along with the start and stop dates. Also, be sure to select "First Of The Month Payment" in the buyers note. Copy of any contract documentations from vendors must be sent to Accounts Payable referencing the corresponding requisition number.

2. The “Contract Voucher Request” form (Appendix 2.11.2.A) is a three-part form distributed as follows:

   - WHITE ORIGINAL Accounts Payable
   - YELLOW Divisional Business Office
   - PINK Requisitioner
Note: Blank Contract Voucher Request forms are obtained from Accounts Payable.

3. The completed Contract Voucher Request form, with all original documents attached, is approved by the appropriate departmental personnel and submitted to the Divisional Business Office.

The pink copy of the Contract Voucher Request form is retained by the requisitioner.

Note: All Contract Voucher Request forms must be supported by documentation (i.e., contract, lease).

4. The Divisional Business Office reviews the Contract Voucher Request form for the following:
   - Appropriateness of expenditure
   - Budget availability
   - Required signature approvals
   - Validity and appropriateness of general ledger account numbers
   - Accuracy and completeness of the Contract Voucher Request form

5. The yellow Copy of the approved Contract Voucher Request form is retained by the Divisional Business Office.

6. Denied Contract Voucher Request forms are returned to the requisitioner with an explanation for the denial.

7. The approved Contract Voucher Request form, with all original documents attached, is forwarded to Accounts Payable for payment.

8. The white original copy is retained by Accounts Payable and filed by vendor.

9. To cancel a Contract Voucher Request, send a memo to the Divisional Business Office and Accounts Payable. Include the name of the vendor, the Contract Voucher Request form number, and the date the contract is effectively cancelled.
A Voucher Request is used when requisitions have non-invoice payment terms. Types of Voucher Request include the following:

1. CHECK-ENCLOSED (CHECK):
   - Reimbursements for authorized business-related expense (see Policy 5.10 & 5.20)
   - Payment to individuals (i.e. service fees, volunteer reimbursements, participants in study, research subject reimbursements, awards/scholarships, fellowship stipends, refunds)
   - Consultants/Honorariums (see Policy 2.11.3)
   - Payment to healthcare providers for medical, lab or pharmaceutical services – invoice contain HIPAA protected healthcare information (PHI)
   - Prepayments - registrations & deposits
   - Sponsorship support and donations
   - Postage meter refill

2. CHECK & FORM ENCLOSED (FORM):
   - Annual fees
   - Subscriptions / Publications
   - Payment of interlibrary loans
   - Cost reimbursement to sub grant recipients (i.e. CONRAD)

3. FIRST OF THE MONTH PAYMENT (FOMP):
   - Contract Voucher Request (see Policy 2.11.2)

4. ELECTRONIC WIRE TRANSFER (CWIRE):
   - Foreign draft for international payment

5. EVMS INTERDIVISIONAL CHARGES (IDT):
   - Parking medium (i.e. stickers, windshield tag, proximity card)
A Voucher Request shall not be used to circumvent the competitive bid process required in accordance with Materials Management Policy 2.10.4.

If a Voucher Request is determined to be inappropriate, Materials Management may cancel the Voucher Request and return to requestor or process the Voucher Request using an EVMS purchase order.
POLICY

The “Consultant/Honorarium” form is used when entering into contractual arrangements with non-
employee individuals, sole proprietors and partnerships only. In accordance with IRS regulations,
payments to these entities are reported to the IRS on Form 1099-MISC at the end of the calendar year.
This form is not to be used for paying employees, corporations, research subject reimbursements, or
for a person who is acting as an employee.

The Consultant/Honorarium form is invalid without an Eastern Virginia Medical School Purchase
Order issued by Materials Management. No services should be rendered by the vendor prior to receipt
of an Eastern Virginia Medical School Purchase Order.

PROCEDURES

1. For OneSource users, refer to the OneSource Procurement/Accounts Payable Manual.

2. A current “Consultant/Honorarium” form (Appendix 2.11.3.A) must be completed to accompany
each purchasing requisition (see “Requisition”: Section 2.11.1) for a consultant and/or honorarium
payment to a non-employee individual, a sole proprietor, or a partnership (“vendor”). Where
multiple payments are made on one agreement, attach a copy of the current consultant/honorarium
form to the requisition. Requisitions for consultant/honorarium payments to a vendor must include
the vendor’s tax identification number.

3. An independent contractor versus employee questionnaire (Appendix 2.11.3.B) should be
completed and forwarded to the Controller in situations when it is not apparent whether the
individual is acting as an independent contractor or an employee. The Controller will review the
questionnaire and advise you of the proper classification of the individual. If the individual’s
classification is not easily determinable, the questionnaire should be completed before contracting
with the individual to avoid completing two sets of paperwork, i.e., if the classification is reversed,
and to avoid a delay in payment.

4. Only one Consultant/Honorarium form needs to be completed for each contract period. Indicate
the total period of time consulting work is to be performed and the rate to be paid.

Note: The Consultant/Honorarium form is not a valid contract until a Medical School Purchase
Order is issued to the vendor.

Effective Date: 07/01/91 Policy Revision Date(s): 06/10/03, 06/30/97

Approved: Board of Visitors

Approval Date: 06/10/03 Procedure Revision Date: 06/30/97 Page 1 of 3
5. The original Consultant/Honorarium form, along with a completed purchasing requisition should be forwarded to the appropriate departmental and Divisional Business Office in accordance with “Requisition” procedures: Section 2.11.1. The Divisional Business Office forwards the approved requisition to Materials Management.

6. Materials Management assigns a Purchase Order number. The vendor will be responsible for sending invoices directly to the Medical School Accounts Payable Office, referencing the Purchase Order number for payment.

7. Materials Management codes the vendor in the system to track payments to be reported on IRS Form 1099-MISC.

8. Special considerations for non-US citizens:

   Payments to foreign visitors, referred to as non-resident aliens, are governed by both immigration law and IRS law.

   a) Immigration law:

      ▪ Type of allowable payments are available to visitors based on the immigration status. It is necessary to know the status before payment can be made.

      ▪ In order to secure reimbursement to foreign visitors, obtain a copy of the visa and attach it to the “Consultant/Honorarium" form.

   b) IRS law:

      ▪ All payments are subject to IRS withholding rules unless covered by a tax treaty.
TAX IMPLICATIONS

Care must be taken to distinguish between individuals working as consultants (paid using Consultant/Honorarium forms through Accounts Payable) and individuals working part-time or full-time who should be paid as employees through the Payroll system.

In order to meet legal requirements for tax withholding, the following guidelines should be considered when hiring temporary help:

1. If there is an employer-employee relationship for the service performed - [that is, “the person for whom services are performed has the right to control and direct the individual who performs the service” (Prentice-Hall, p. 2552(a)1)], the person performing the service cannot be paid as an independent contractor through Accounts Payable.

2. If a person meets the requirements in #1, but they are employed full-time elsewhere or they have a separate tax id#, they are still considered to be a part-time temporary employee of the Medical School.

3. Managers, minors, students or persons working in the place of regular employees are considered employees and cannot be paid as independent contractors through Accounts Payable.

4. Persons who are partners, independent contractors or sole proprietors of a business can be paid through Accounts Payable. They present themselves as being in an independent trade, business or profession in which they offer their services to the public. These persons are considered self-employed and are responsible for withholding and social security taxes.

5. Any person who is paid as an employee through payroll cannot also be paid as an independent contractor through Accounts Payable, (i.e., payment to an employee “moonlighting” in another department must be made through Payroll).

6. For Social Security tax purposes, those persons in #1 or #2 above who are paid $50 or more in a fiscal quarter are subject to tax and therefore would have to be paid through Payroll to meet legal requirements.

7. Contact the Financial Services department for assistance in making a determination. A questionnaire designed by the IRS is used in situations where the distinction is difficult to make.
POLICY

Honorarium payments to foreign scholars and non-resident aliens require adherence to both IRS and INS laws applicable at the time of contracting with the foreign scholar. Departments contracting with such individuals must refer to the current laws and regulations prior to contracting with such foreign scholars to avoid potential problems. If you are unclear about the current laws and regulations, you must consult with Financial Services for advisement.

The following procedures are for visiting foreign scholars performing personal services that result in a consulting type fee or honorarium payment. The Immigration and Naturalization Service currently permits B-1 and B-2 visa holders to receive consulting fees, honorariums and travel reimbursements, as long as activity does not exceed 9 days and the scholar has not accepted payments from more than five institutions over the past six month period. If the visiting foreign scholar is traveling on another type VISA and is performing duties beyond 9 days, please contact human resources for guidance.

The Internal Revenue Service (IRS) requires a 30% withholding on payments for personal services paid to visiting scholars, unless the individual is exempt from withholding by an in force tax treaty. If eligible, tax treaty exemptions are not automatic and must be applied for by submitting a Form 8233 to the IRS.

PROCEDURES

1. Before contracting with a foreign scholar/non-resident alien:

   • Advise the individual that if he/she is not eligible for a tax treaty exemption, his/her payment will be subject to a 30% withholding.

   • Advise the individual that he/she plans to apply for a tax treaty exemption; he/she must have a tax identification or social security number to apply. If the individual does not receive his/her tax identification by the payment is made, EVMS must withhold the 30%.

   NOTE: If subsequent to payment, the individual applies for and is granted an exemption, the individual can request a refund from the IRS via an U.S. tax return.
# Consultant/Honorarium Payments to Foreign Scholars

**2.11.3.1**

- Tax identification numbers (ITIN) can be obtained by submitting a Form W-7 available at [www.irs.gov](http://www.irs.gov). Social security numbers are for individuals eligible for social security and can be obtained by submitting a Form SS-5 available at a Social Security office or at [www.ssa.gov](http://www.ssa.gov). It generally takes 4-6 weeks to receive a number.

  **NOTE:** A foreign person may have difficulty obtaining an ITIN while still overseas. According to the IRS, there are permanent staffs that are able to process a W-7 in Bonn, London, Mexico City, Paris, Rome, Santiago, Singapore, Sydney and Tokyo. In addition, there are public accounting firms that qualify as acceptance agents. A list of current firms are available at [www.irs.gov/prod/ind_info/agents](http://www.irs.gov/prod/ind_info/agents).

- Verify the type VISA the scholar will be obtaining.

- Verify the individual’s business activity will not exceed 9 days and he/she has not accepted payments from more than five institutions in the past six months.

- If the travel is beyond the scope outlined in the policy above, the following procedures are not applicable.

2. Upon arrival, obtain a copy of the traveler’s VISA, with the applicable VISA status apparent, and proof of his/her tax identification or social security card, if applicable.

3. Complete the consultant/honorarium form per procedures referenced in policy 2.11.3. VISA information must be attached to the form.

4. Verify whether or not the individual is eligible for a tax treaty benefit. Current tax treaties are listed in IRS Publication 901. If he/she is not eligible, go to number 9 below. Payment will be processed with the mandatory 30% withholding.

5. If the individual has not obtained a tax identification or social security number at the time of payment, the individual cannot apply for a tax treaty exemption. Therefore, it is required to withhold 30% of the gross payment, regardless whether the individual is eligible for tax treaty benefits.
**Consultant/Honorarium Payments to Foreign Scholars**  2.11.3.1

6. If the identification number is received and the individual is eligible, the individual may request exemption from withholding because of tax treaty benefits. If so, the foreign scholar must complete a Form 8233 requesting the exemption from the IRS.

   - Note: Not all foreign scholars are eligible for tax treaty benefits. Tax treaties are constantly changing and treaty status must be verified before accepting a Form 8233. (See #4 above.)

7. Review the Form 8233 for correctness. If you know of any reason that the assertions or facts are inaccurate or false, do not accept the form. If the form appears correct, complete and sign Part II of the form.

8. Forward the original Form 8233 to Financial Services immediately upon acceptance, keep one copy of the form for your files and give one copy to the foreign scholar. Each copy must include any attachments provided by the foreign scholar. Financial Services will remit the form to the appropriate IRS office but must do so within 5 days of acceptance of the form. Note: If Financial Services discovers the tax treaty is not valid, Financial Services will notify the department and 30% of the gross amount will be withheld from payment.

9. Process the corresponding requisition for payment as appropriate.

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**Travel Reimbursements to Foreign Scholars**

EVMS can reimburse foreign scholars as long as expenses are reimbursed in accordance with IRS accountable plan rules. When requesting travel reimbursement, EVMS policy and procedures regarding travel are in force. Please refer to Policy 4.10.

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Note: For additional guidance on the matter, please refer to IRS Publication 515: Withholding of Tax on Nonresident Aliens and Foreign Corporations. IRS publication 901 provides current treaty information. Foreign scholars can refer to IRS Publication 519 for information regarding his/her requirements including how to request a refund. All publications are available at www.irs.gov.
POLICY

EVMS occasionally performs research that includes human subject ("research subject") participation. Granting agencies may authorize EVMS to reimburse the research subjects for their participation in the research studies. The reimbursement may be either an amount predetermined by the granting agency or a reimbursement of expenses incurred by the research subject while participating in the study (i.e., mileage).

Payment to the research subject is made either on a periodic basis or at the end of the study, depending on the requirements of the particular study. The reimbursement is used as a tool to attract research subjects. The reimbursement does not compensate the research subject for services rendered.

Research subject reimbursements are paid through the EVMS Accounts Payable Office. The research subjects will receive a 1099 at the end of the calendar year in accordance with IRS regulations.

When necessary for the research/study, EVMS will reimburse airfare, lodging, taxi and mileage for research subjects in accordance with EVMS travel policy Section 4.10. EVMS will not reimburse insurance co-pay or other charges for treatment by any physician.

PROCEDURES

1. The research subject must read and sign the Research Subject Reimbursement Form (Appendix 2.11.4.A) prior to entering the study. The form must be signed by the Appropriate Departmental Representative and the Divisional Business Office.

   NOTE: The research subject’s social security number must be on the form. Proof of identification and social security number must be submitted and verified by an EVMS employee.

2. The department must maintain the original Research Subject Reimbursement Form. A copy should be given to the research subject.

3. To request payment to a research subject, complete either a “Clinical Trial Research Subject Requisition Form” (Appendix 2.11.4.B) or a purchasing requisition (see “Requisition”: Section 2.11.1).
The Clinical Trial Research Subject Requisition Form is designed for paying multiple research subjects where payment requests for a particular study have a high frequency. Contact the EVMS Controller’s office for authorization to use a Clinical Trial Research Subject Requisition Form in place of a purchasing requisition.

4. A copy of the Research Subject Reimbursement Form must be attached to the requisition.

5. Special considerations:
   - Payments cannot be made to a non-resident alien with a tourist B-2 visa. Visitors with a temporary business B-1 visa can receive payments for travel and per diem only.
   - All payments are subject to IRS withholding rules unless covered by a tax treaty.
   - To secure reimbursement for foreign visitors, Xerox from the passport the I-94 form (arrival and departure record) and attach it to the Research Subject Reimbursement Form.

TAX IMPLICATIONS:

The research subject is responsible for any federal or state taxes relating to the payments, including self-employment income taxes.
POLICY

The U.S. Department of Agriculture requires that all animals be purchased under the supervision and with the assistance of a qualified veterinarian, as directed by the Animal Welfare Act and other applicable guidelines.

PROCEDURES

1. Requests for the purchase of animals are forwarded to the Department of Animal Resources, Lewis Hall.

2. The Department of Animal Resources creates a purchase order and coordinates the delivery of goods.
RADIOACTIVE MATERIAL  2.11.6

POLICY

Eastern Virginia Medical School is licensed to possess and use radioactive material by the Nuclear Regulatory Commission and Commonwealth of Virginia. Each individual proposing to use radioactive material is required, by license condition, to submit an application that documents previous training and experience with radioactive material and describes the specific radionuclide and proposed protocol. For further information, reference the EVMS webpage at http://www.evms.edu/radsafety.

Guidance for the safe use of radioactive material in the laboratory is presented in the EVMS Radiation Safety Manual.

The Department of Radiation Safety processes radioactive material purchases.

PROCEDURES

1. Requests for radioactive material are forwarded to the Director of Radiation Safety and Environmental Health and Safety Department, Lewis Hall.

2. The Director of Radiation Safety creates a purchase order and coordinates the delivery of goods.
POLICY

I. Property and Plant Maintenance Contracts

Property and plant maintenance contracts are awarded by competitive bid process as required in accordance with Materials Management Policy 2.10.4.

Maximum term limit for maintenance contracts is five years with option for two one-year extensions to provide both flexibility and long-term price protection for the Medical School.

Property and plant maintenance contracts issued for more than the maximum term limit must be approved by the Vice President for Administration and Finance.

The competitive bid process should be administered 3-6 months prior to the end term of maintenance contracts.

II. Equipment Service Contracts

Certain pieces of equipment are covered by a service contract in order to assure continuing efficient operation. Forms required by equipment service companies must be signed on behalf of the Medical School by the Director of Materials Management and forwarded to the service company with a Purchase Order.

Materials Management enters the purchase order into the system, denoting the contract terms so that Accounts Payable can match the invoice against the Purchase Order for payment.
POLICY

All computer hardware and/or software purchases over $1,000 must be approved by the appropriate data processing department.

Objectives

The objectives of this policy are:

1. To insure institutional compatibility of all computing resources that will at any time require incorporation into the EVMS Campus Computer Network (CCN).
2. To maintain an institution-wide inventory of such resources.
3. To reduce the possibility of software fraud.
4. To improve corporate buying practices, thereby reducing costs to the institution.

The intervention of the data processing departments in the procurement of computer hardware and software is not intended to encumber or impede the acquisition process but to facilitate the accomplishment of the above policy. This does not supersede any Materials Management or Business Management Office policies.

PROCEDURES

1. For OneSource users, refer to the OneSource Procurement/Accounts Payable Manual.

   For computer requisitions, the ITMT representative must be able to review the specifications for technical approval purposes. The Materials Management Computer Buyer must also have visibility of the specifications in order to process the requisition. This requirement can be satisfied by faxing a copy of the quote to both departments.

   For Gateway quotes, there are two other methods available which are easier and faster:
• If any of the pre-configured systems at: http://info.evms.edu/computerinfo/postdocs/packages/default.htm fits your needs, you can just specify the quote number in your requisition and no further transmission of specifications is required.

• If you want to customize your own Gateway system, go to: http://esource.gateway.com/evms, configure your system as usual, and then email rather than fax the quote to the necessary individuals.

The process for emailing a quote is the same as printing a quote except for the last step. The complete procedure for developing the quote is as follows:

• Select a system with the features you need, click on the customize it link, select the options you desire, and click on the update price link at the bottom of the page.

• Verify that the updated page has the features you intended and that the updated price fits your expectations.

• Then click the quote it link either at the top or bottom of the page. This brings up the Quote Information Sheet which asks for Customer information at the top of the web page. You don't need to enter any of the customer information data.

• If the quote seems okay, go to the bottom of the page and click on the save as quote link. The next page shows your quote number and provides links to email or print the quote.

• Click on the email quote link, and a new browser window opens which allows you to specify the recipients for the email. Multiple recipients can be added, separated by semicolons. Ensure that the recipients’ email addresses are entered in the To: box.

• In the message subject box, enter your name so Materials Management will know who is originating the quote. Scroll to the bottom of the window and click the send link. You can still go back to the browser window with the print option and print a copy for your records, but no faxes are required.
2. For non-Gateway systems, contact vendors for quotes. Approved, recommended and non-allowed vendors are listed in the Computer Configuration Standards Guide (Appendix 2.11.8.A). All purchases must include each of the required components as listed in the Computer Configuration Standards Guide.

NOTE: No orders are allowed to be placed with a vendor by any employee outside of the Materials Management department. Payment for any orders placed directly with a vendor outside of the approved Materials Management process will be the responsibility of the person placing the order.

3. Review the vendor's proposed configuration against the required and recommended components found in the Computer Configuration Standards Guide.
POLICY

Service contracts are awarded by competitive bid process as required in accordance with Materials Management Policy 2.10.4.

Maximum term limit for service contracts is five years with option for two one-year extensions to provide both flexibility and long-term price protection for the Medical School.

Service contracts issued for more than the maximum term limit must be approved by the Vice President for Administration and Finance.

The competitive bid process should be administered 3-6 months prior to the end term of service contracts.