



Date: March 3, 2009

From: Steve C. Blazer, Assistant Director, Purchasing Services

Distribution: Campus Directors of Business Services
Financial Officers
Guru Posting
IBIS Notice
Purchasing Website (www.purchasing.psu.edu)

Subj: STANDING ORDER PREPARATION - **Fiscal Year 2009/2010**

Standing Orders may be processed electronically through IBIS for the 2009/2010 fiscal year. To allow sufficient time for us to review and process your request, all Standing Order requests should be received by Purchasing Services **no later than May 15, 2009**. Requests received after that date **will be processed** but may not be finalized by fiscal year-end.

Before you submit a request, please evaluate whether it is in fact necessary to renew your Standing Order. The availability of Purchasing Cards and eBuy, has eliminated the need for many Standing Orders and may provide an alternative method of payment for your purchasing needs. Current eBuy suppliers include: Apple Computer, Applied BioSystems, Barnes & Noble, CDW-G, Dell Computer, DOT Scientific, EMSCO/Corning, Grainger, Invitrogen, K.I. Corbett, Lenovo, McCartney's, MSC Industrial Supply, Newark, Office Max Technology, PSU Computer Store, PSU General Stores, Sigma-Aldrich, Supply Source, Technology Integration Group, The Hite Company, Thermo Fisher Scientific, VWR International, WESCO Distribution, Inc., etc. Visit www.ebuy.psu.edu to view all eBuy suppliers.

All Standing Orders are subject to normal purchasing procedures including audit and continual review by Purchasing Services. Any Standing Order in excess of \$10,000 or Standing Orders that are increased during the fiscal year to exceed \$10,000 requires evidence of competition or sole source justification. When choosing a supplier, please keep in mind their diversity status and their ability to provide environmentally sustainable products.

In the event that you need to increase your Standing Order total during the fiscal year, you must submit a Purchase Order Change Form to Purchasing Services. Standing Order payments that exceed the Standing Order total will not be approved for payment.

Please follow the guidelines below when entering your Standing Order requisition:

1. **When entering the IBIS purchase requisition using REQR, the "Order Type" must be "SO" to indicate Standing Order. The "Fiscal Year Date" should be 2009/2010.**

2. For all Standing Orders, **select the “lump sum pricing” option**. To do this, enter an “L” at the “P/Q/A/L: ___” field in the REQR. Purchasing Services may reject any standing order requisitions not designated as “lump sum”.
3. **Realistically** estimate the annual dollar requirements of the Standing Order.
4. In the REQR “item description” and “note to vendor” text, please do not use the keyboard tab or enter key to indicate new lines. IBIS text width varies from the Purchasing System’s text width. Indicate an intended new line by inserting three dashes “---” between the lines. Visit the website provided at the end of this memo for more detailed instructions and examples.
5. Identify in detail the type of item(s) to be purchased.
6. If the Standing Order replaces a previous year’s Standing Order, identify the previous Purchase Order number.
7. For items on continual rental, lease, or maintenance, include serial number(s) of unit(s) covered. Use individual orders for rental, lease, and/or maintenance agreements.
8. Name the individual(s) authorized to initiate orders with the supplier. Do not state “or authorized representative.”
9. Specify the method of pick-up or specify the delivery point. An individual authorizing an order should not also be verifying the receipt of the items. In the event items must be authorized and picked up by the same individual, the signed receipt must be turned in to a second individual within the department for receipt verification and payment authorization.
10. A receipt should be signed when material is picked up from a supplier. Be sure a copy is returned to the department or Financial Officer.
11. Equipment purchases are **not** permitted on Standing Orders.
12. Items offered by General Stores are **not** to be purchased on Standing Orders from outside suppliers.

Please visit website <http://guru.psu.edu/central/DisplayDept.cfm?did=7> for more detailed REQR entry instructions. Instructions for Standing Order preparation may also be found on the Purchasing website at <http://www.purchasing.psu.edu>. You may also find other very useful information on our website.