
Monthly Campus Buyers Meeting
April 5, 2017, 1:30 – 3:00 pm
KL232 and via Zoom Access Code 2092284085

Procurement Services Department Attendees:

Karen Meade, Stephanie Zuniga, Todd Harris, Kristi Morales, Jackie Mendez, Ken Masasso, Joe Hebert, Edmund Leung

1. Welcome and Introductions

Karen opened the meeting at 1:30 pm and welcomed all attendees.

Karen introduced Edmund Leung as the new Procurement Analyst. Edmund started at UCM on March 13, 2017.

2. Yearend Deadlines for Fiscal Close

The Fiscal Yearend deadline will be on May 19 with exceptions such as RFPs.

3. Year End Cleanup (H&Is, Open Commitments)

Kristi demonstrated how to export the H&I report into Excel and how to check the hold reasons. She stressed the importance of checking every line item. If items are over 3 years old, UCLA will close once the department verifies the vendor has been paid in full.

On open commitments, POs do not close out if it is an R class that was utilized for a P class.

I = In Progress, Y = Encumbered, not paid, C = Complete

4. Chemical Purchases

- a) Must be approved by Karen Smith.
- b) Certain chemicals, such as Ethanol (96%+) and Controlled Substances require that Procurement Services place the order. Karen Smith identifies who can order.

5. Check Request Form – Who is Authorized to Sign the Request?

Department buyer is acceptable to UCLA, because the MSO must approve PO anyway. Duplicate authorization by MSO is not required. The check request form may be located at: <http://ap.finance.ucla.edu/Check-Request.xls>.

6. System Wide Agreements

There was a live demonstration on how to find system-wide agreement terms and conditions (display of links, etc.).

7. How to Look Up which Buyer is Working on the Requisition

Please follow the instructions on the link below:

http://procurement.ucmerced.edu/sites/procurement.ucmerced.edu/files/documents/who_in_procurement_is_working_on_my_order.pdf

Department Buyers were requested to contact the Procurement Buyers directly vs. e-mailing procurement@ucmerced.edu.

8. Roundtable

a. When is the BFS website going to be updated?

It is unknown at this time. This will be announced once known.

b. Can a PCard FAU be changed?

A PCard FAU can be changed only before invoice posts. Delete the cart, change order, type in reason and it will default to a brand new cart, then you can enter a new FAU.

Karen Meade called the meeting to an end at 3 pm.