

## Finishing FY18

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- **Invitation for Bids (IFB) and Requests For Proposals (RFP)** (any dollar amount) – **June 8, 2018 by 5:00 p.m.** is the deadline for submission of **FY18 BearKatBuy Requisitions** for Invitation for Bids and Request for Proposals. Please ensure that specifications and all attachments such as drawings, cut sheets, etc. are attached to the requisition.
- **Last Day for Submission of FY18 BearKatBuy Requisitions (under \$15,000 or over \$15,000 and available under contract)** – **Requisitions must be in the Procurement Approval Queue on August 30, 2018 by 5:00 p.m.** Please ensure all required attachments are included with your requisition.
- **Cleanup of Open Orders and Incomplete Requisitions** – During the months of May, June, July, and August the Procurement Department will be running reports that show incomplete documents and open purchase orders so that we can work with Departments to get these items closed out or completed to allow for a successful close out process for end of the fiscal year. Working these reports will be an ongoing process for the balance of FY18 that will require the efforts of Departments as well as Purchasers. Cleanup will include removing left over balances on orders that are no longer needed, such as open/blanket orders, deleting Requisitions that were never completed but are holding funds or have an “open” status in Banner.

## Purchases Using FY19 Funds

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- **FY19 BearKatBuy Requisitions** cannot be processed until the **FY19** period is opened by the Controller's Office on or about July 1, 2018 for end user to submit requests for FY19 purchases.

**All FY19 Requisitions must have an ACCOUNTING DATE of SEPTEMBER 1, 2018 or LATER. Please refer to the BearKatBuy FAQ (<http://www.shsu.edu/dept/procurement/training.html>) for instructions on setting the Accounting Date (on the requisition billing tab) as well as refresher information on making and submitting BearKatBuy requisitions.**

## Reminders For Preparing FY19 BearKatBuy Requisitions

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- **Rental/Lease of NEW Copiers for delivery with an effective date of September 1, 2018**  
*This section does not apply to renewal of copier rentals/leases. (See below for instructions on renewals.)*  
Departments may submit a BearKatBuy requisition on or after July 1, 2018 with an accounting date of September 1, 2018 or later. All Departments may use either the BearKatBuy Punch-Out Suppliers (required for non-Academic Departments) or can obtain a vendor quote for a copier that references a group, DIR, or TXMAS contract and attach the quote to the requisition. **Additional key information to include on the BearKatBuy requisition includes:** Equipment serial number, the building and room number where the equipment is to located, and any agreements/contracts (consult PRE-05 to determine who has signature authority on agreements/contracts).
- **Rental / Lease of Existing Copiers \*NOTE: NEW PROCESS FOR COPIER RENEWALS\***  
Procurement will prepare all requisitions, as draft carts, for renewals of all existing rented and leased copiers based on Departments FY18 contracts and requisitions. Draft carts will be assigned to the Department to add the FOP and for submittal in BearKatBuy. Departments will still be responsible for submitting requisitions for overages as blanket orders. **Key information to include on the requisition includes:** FY18 purchase order number, equipment serial number, and the building and room number where the equipment is located.
- **Rental/Lease of Equipment, Maintenance and Services (RENEWALS)**  
**Yearly rental/lease of equipment, maintenance, and services do not automatically renew each fiscal year.**  
Departments must submit a **new requisition** for continuation of these agreements. Identify any changes from **FY18** that are required for the next fiscal year. **Key information to include on the requisition includes:** FY18 purchase order number, equipment serial number, and the building and room number where the equipment is located. Attach any renewal reminder notices, maintenance and service agreements/contracts (consult PRE-05 to determine who has signature authority on agreements/contracts) to the BearKatBuy Requisition.
  - For **owned copier maintenance**, provide an estimated copy count for black and white and color copies. The cost of copier maintenance is based on a department's estimated annual usage so a requisition cannot be processed without an estimated copy count for the upcoming fiscal year.
- **Water Services**  
Some departments only purchase bottled water (account code 731500) while other departments purchase water along with rental of a dispenser (740600), purchase cups (730000) and pay the surcharge(721000). Please include a FOAP and dollar amount for each of the items above, as applicable, to your department's order.
- **Delivery Services**  
Indicate the vendor (FedEx, UPS or Lone Star) you want to utilize, the estimated annual dollar amount and the **vendor assigned account number** for your department. Procurement will not process a requisition for delivery services (account code 728600) that lacks a vendor assigned account number.