



ALABAMA A&M UNIVERSITY

Service is Sovereignty

Welcome



2026 Purchasing Training

Presented by: The Purchasing
Department



MEET THE PURCHASING TEAM

Jeffrey L. Robinson, CPPA CPPS (jeffrey.robinson1@aamu.edu)

- Director of the Purchasing Department
- Reimbursement pre-approvals request
- Processes BID requests/requests totaling **25k** and greater

Brandy Twumasi brandy.twumasi@aamu.edu

- Senior Buyer for (A-L) Vendors
- Processes requests totaling **\$24,999.99** and below
- Processes Vendor ID Requests

Desiree McGlothin purchasing@aamu.edu

- Buyer for (M-Z) Vendors
- Processes requests totaling **\$24,999.99** and below
- Processes tax exempt certificate requests








Overview



- **Authorized Spending Only**
Purchasing is the only department that can commit University funds
- **Smart & Efficient Buying**
Supporting education, research, and operations
- **Fully Compliant**
Follows Federal, State, and University regulations

What You'll Learn

-  Policies & Procedures
-  Alabama Purchasing Laws
-  Banner 9 Demo



Disclosure Statement Requirement (Alabama State Purchasing Law)

- A Disclosure Statement is required when the total contract value exceeds \$5,000.

Bid Law Ala. Code 41-16-20(a)

- Purchases of products and services \$25,000 or more must be let by free and open competitive bidding, on sealed bids, to the lowest responsible bidder.

When No Bid is Required

- Sole Source Designation
- Professional Services Designation Law Ala Code § 41-16-72
- Joint Purchasing Agreement- JPA



Sole Source Designation

Justification:

A sole source purchase means that only one supplier (source), to the best of the requester's knowledge and belief, based upon thorough research, (i.e. conducting a market survey), is capable of delivering the required product or service.

Similar types of goods and services may exist, but only one supplier, for reasons of **expertise, and/or standardization, quality, compatibility with existing equipment, specifications, or availability**, is the only source that is acceptable to meet a specific need.



Invitation to Bid

The bid process is used to obtain the greatest benefit to the University when acquiring goods and services.

- The bidding process is implemented by the Purchasing Department.
- When the bid process is necessary, at least three sources must be contacted, providing that adequate sources exist.
- Departments are welcome to indicate suggested sources if appropriate. The Purchasing Department may include additional sources.
- Prior to the initiation of the bid process, the requesting department will submit detailed specifications for the desired product or service to the Purchasing Department using the Bid Request Form. Please remember that the specifications must describe everything used to evaluate the quotations.



Request For Proposals (RFP)

A Request for Proposal (RFP) is a document utilized for the procurement of services (consulting services, etc.) or when competitive sealed bidding is not practicable because technical and performance capability must be evaluated.

- The RFP will specify the evaluation factors to be used and contained or incorporated by reference and other applicable contractual terms and conditions.
- In contrast to competitive bidding, the procedure permits negotiation of proposals and prices.
- Requests for Proposal close on the due date and time designated on the RFP documents and are not subject to public opening. Proposals are then reviewed for acceptance by the Purchasing Department before being evaluated by a committee.



Procurement Compliance & Protecting University Funds

Purchasing Authority

- Only the Purchasing Department has been vested with the sole authority to obligate University Funds.
- The University will assume no obligation without an authorized Purchase Order
- Purchases made before a PO are unauthorized and may not be honored

Financial Risk

- Unauthorized purchases may result in personal liability
- This is for Budgetary constraints prevention

Invoice Before PO? No!

- University funds cannot be obligated before proper approvals
- **Quotes** are needed to create a Purchase Order — **not invoices**



Allowable and Unallowable Expenses

Allowable

An Allowable Expense is defined as a necessary, reasonable, and appropriate expense incurred for the primary benefit of University business and therefore permitted to be reimbursed or directly charged based on the permission of the University or by the terms of federally or privately sponsored agreements.

Unallowable

An Unallowable Expense is any expense that does not meet the criteria of reasonable, allowable, or an appropriate expense as defined above.



Allowable and Unallowable Examples

Allowable

- Could the cost be comfortably defended under public scrutiny?
- Would you be confident if the cost was selected for audit?
- Would you be comfortable explaining to a donor that their donation was used this way?
- Has it been adequately documented?
- Would you be comfortable reading about it in the newspaper?

Unallowable

- Examples of unallowable expenses include, but are not limited to:
- Memorabilia, promotional, or personal items for employees such as watches, non-business related phones, athletics accessories and equipment, gifts, apparel, etc.
- Upgraded first/business class travel or lodging services
- Personal care services including, but not limited to hair and skin care, makeup, spa services, etc.
- Alcohol
- Entertainment without appropriate approval



Proper Purchasing Compliance Flow



PURCHASE ORDER RECEIVED

Department should provide a descriptive quote(s) for desired product or services.
Requisition must be fully approved in Banner.
Amount of request may warrant additional steps or documentation; i.e. disclosure statement, bid solicitation.

[Receiving Report Form](#)



Goods Received / Services Rendered

Once goods or services are provided, a *Receiver Code* must be requested in order to acknowledge fulfillment of Purchase order request.

A Memorandum of Receipt request (MRR) can be located on the Property Management forms page.



INVOICE PAID

Invoices for goods or services *received* should be submitted to:

accounts.payable@aa.mu.edu



Exceptions to Quotes

Common Purchasing situations where an invoice may be used instead of a quote.

Common Scenarios:

- Utilities – electricity, water, internet billed monthly etc.
- Memberships & subscriptions – annual dues or renewals
- Conference & training registrations
- Emergency repairs already completed
- Vendors with signed AAMU contracts
- Recurring services – pest control, alarm monitoring, etc.
- Government or interagency fees





Live Demonstration Self Service Banner 9 (SSB9)

 How to Create a Purchase Requisition

Approving

 Reviewing

Disapproving Requisitions

[SSB9 Banner](#)



Vendor ID Request

When to Submit a Vendor ID Request

- Vendor is not found in Banner

How to Submit in Laserfiche

- Log into Laserfiche
- Select Vendor ID Request Form
- Complete form by entering vendor Information



Upload Required Documents:

- W-9

Submit for Workflow Approval



Purchase Order



What to do when you receive a copy of the PO

- Ensure vendor has received a copy of the PO so they can fulfill the order
- Ensure Accounts Payable (accounts.payable@aamu.edu) receives a copy of the invoice, if applicable and (PO) number for reference, for payment processing.

What to do when you receive the goods or services

- Complete Memorandum receiver report for ***tangible items *** in Laserfiche



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 Any Questions? 

Thank you for attending! 

You can email us



purchasing@aamu.edu