INDIANA DEPARTMENT OF ADMINISTRATION PROCEDURE FOR PURCHASING AGENTS PROCESSING PURCHASING REQUESTS

Purpose:

Indiana Department of Administration (IDOA) Purchasing Agents are charged with ensuring all purchases are made in accordance with procurement laws and policies. The purpose of this policy is to establish time frames for processing purchases for agencies for which IDOA serves as Purchasing Agent, as well as Divisions inside IDOA. Setting clear expectations allows for easier planning for both the IDOA Purchasing Agent and the requesting entity.

Definitions:

DPAP	Delegation of Purchasing Authority Program.
Commodities	Equipment and supplies.
Procurement Contracts	The document that results when there is a need for services over $2,500 and/or encompassing a term of 90 days or more.
Formal Process	Solicitation method for purchasing commodities ($5,000 - $75,000). Solicitation method for procurement contracts ($2,500 - $75,000).
IDOA Purchasing Agent	IDOA Purchasing Administrator who facilitates the purchasing process (under $75,000) for specific agencies and IDOA Divisions.
Informal Process	Solicitation method for purchasing commodities ($500 - $5,000). Solicitation method for procurement contracts ($500 - $2,500).
Requesting Agency	Agency that is submitting the purchasing request.
Requestor	Person from agency that submitted the purchasing request.
QPA	Quantity Purchase Agreement.

Applicability:

This policy applies to purchases under $75,000 that are processed by IDOA Purchasing Agents.

Procedures:

Requisition: The purchasing process starts when a requisition is sent to the IDOA Purchasing Agent through PeopleSoft. The IDOA Purchasing Agent will either accept or deny the requisition. If the requisition is not filled out correctly, then the IDOA Purchasing Agent <u>may</u> deny the requisition. The determination to accept or deny will be made **within one (1) business day** of receipt and will be sent to the Requestor via email.

**If the requesting agency does not have the authority to create a requisition, then the requesting agency should submit an email to the IDOA Purchasing Agent with the following information:

- Description of the item – quality and item number (if known).
- Specifications and/or justification if specific name brand is needed.
- Preferred vendor and/or three (3) vendors to contact for quotes.
- Funding source. If unknown, please copy your Finance contact on the email so they can provide the source.

Please allow additional **one (1) business day** to complete this step.

Solicitation: Once the requisition is accepted by the IDOA Purchasing Agent, one of the following solicitation methods, as set forth in the DPAP Manual, will be followed:

Informal Purchasing Process:

- IDOA Purchasing Agent will route the requisition for internal approval. IDOA Purchasing Agent will notify the requestor via email when the requisition has been approved. Please allow **two (2) business days.**
- After the requisition is approved, the IDOA Purchasing Agent will begin the informal bidding process for the commodity/contract as outlined in the DPAP manual.
- Once the solicitation is awarded/complete, the IDOA Purchasing Agent will notify the requestor, via email, that they may begin the contract process. If the solicitation does not require a contract, the

IDOA Purchasing Agent will notify the requestor via email when the purchase order has been sent to the selected vendor. Please allow **eight (8) business days** to complete this process**.**

Total time from acceptance of a requisition to completion of solicitation = Ten (10) business days.[1]

Formal Purchasing Process:

- IDOA Purchasing Agent will route the requisition for internal approval. IDOA Purchasing Agent will notify the requestor via email when the Requisition has been approved. Please allow **four (4) business days.[2]**
- After the requisition is approved, the IDOA Purchasing Agent will begin the formal bidding process for the commodity/contract as outlined in the DPAP manual.
- Once the solicitation is awarded/complete, the IDOA Purchasing Agent will notify the requestor, via email, that they may begin the contract process. If the solicitation does not require a contract, the IDOA Purchasing Agent will notify the requestor, via email, when the purchase order has been sent to the vendor. Please allow **twenty (20) business days** to complete this process.

Total time from acceptance of a Requisition to completion of solicitation = Twenty-four (24) business days[3]

QPA Purchasing Process:
- IDOA Purchasing Agent will route the requisition for internal approval. Please allow **three (3) business days.**
- Once approved, the IDOA Purchasing Agent will create the purchase order and send it to the vendor. To complete this process (approved requisition to purchase order sent to the vendor) please allow **five (5) business days**.

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[1] The does not include time to execute a signed contract, nor the delivery time of the product.

[2] The process is longer as additional approvals are required.

[3] The does not include time to execute a signed contract, nor the delivery time of the product.

- IDOA Purchasing Agent will notify the requestor via email once the purchase order has been sent to the selected vendor.

Rush Request:

To request a rush, send an email to your IDOA Purchasing Agent:
- Provide the justification for requesting a rush; and
- Explain in detail the purchase needed.

The IDOA Purchasing Agent will assess the request to determine the best procurement method to use in accordance with the DPAP Manual. This may require additional documentation from the Requestor in the form a "Special Procurement Request" or whatever else the IDOA Purchasing Agent needs. The IDOA Purchasing Agent will gather all other requested information to complete the purchase; keeping the Requestor appraised of the progress.

APPROVED:

Lesley A. Crane
Commissioner
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