SPEED ORDER SYSTEM

State Purchases
Up To
$1500.00

SUNY at Buffalo
Purchasing Department
This booklet was developed to familiarize vendors and departments with the rules, regulations and instructions for processing **SPEED ORDERS** – an alternate method for purchasing goods or services.

This booklet covers the rules and regulations when using **STATE FUNDS**.

**Orders are Not to Exceed - $1500.00**

*PLEASE retain this booklet for future reference.*

Any questions pertaining to Speed Orders may be directed to:

State University of New York at Buffalo  
Purchasing Department  
224 Crofts Hall  
Buffalo, NY 14260  
(716) 645-2676  
Fax (716) 645-2687
SPEED ORDERS

GENERAL INFORMATION

This booklet outlines the policies and procedures to be used by the University at Buffalo when using the Speed Order System (SOS).

The Speed Order System will be authorized for use only to those departments whose representatives have attended training sessions in the proper use and procedures of the Speed Order System. A departmental authorization form must be on file in the Purchasing Department designating signature and ordering authority.

The Speed Order System was developed to:

• Assist departments to pursue and accelerate the ordering, receiving, and payment process by allowing departments to order materials, supplies and services, directly from vendors.
• Provide greater purchasing flexibility to using departments.
• Reduce processing time and paperwork for orders $1500 or less.

The ordering department deals directly with the vendor to authorize and obtain the materials, supplies or services and is also responsible for receipt certification and all actions pertinent to the successful completion of the order.

All purchases must be in compliance with existing State rules and regulations.

MINORITY/WOMEN-OWNED BUSINESS PROGRAM

The State University of New York at Buffalo is totally committed to doing business with Minority-and-Woman-Owned Businesses. Departments should place orders for good and services with MWBEs whenever possible. Periodic review will occur to ensure this commitment is being fulfilled.

The Purchasing Department can provide assistance or a listing of Minority/Woman-Owned suppliers.
SPEED ORDER SYSTEM

TRANSACTIONS

A department may place a Speed Order for materials, supplies or services directly with a vendor when the order meets the following criteria:

- The item is **not** on the restricted list. (See below)
- The total amount of the order **does not exceed $1500** (excluding freight).
- Speed Order and Invoice(s) **Must Match**. Adjust Speed Order form if necessary.
- Invoices should be mailed **directly to the ordering departments, not Accounts Payable**.
- All items on the order must be received before sending in for payment.
- Funds must be available for the purchase.
- Orders may be picked up, called in, faxed or mailed to vendors.
- Goods must be picked up or delivered directly to the ordering department.
- All **freight, if applicable, must be added to the invoice by the vendor**.

RESTRICTIONS

Speed Orders **may not** be used for the following:

- Any improper State purchases, such as alcohol, unjustified food expenses, etc. (see food and beverage guidelines – on our UB Business Web site – under Administrator/Purchases/Food & Beverage).
- Payment to a State University of New York employee.
- Syringes, needles and controlled substances (e.g. narcotics and prescription drugs).
- Live animals.
- Radioactive materials.
- Order exceeding the $1500 limit.
- Specialty gases.
- Those items covered under previously-arranged contracts (standing orders, blanket orders, C-contracts).
- Split ordering – separating orders that if combined would exceed the $1500 limit.
- When a written agreement (other than the Speed Order Form) needs to be signed by a representative of the University (e.g. software license).
- Contracted services already under a negotiated agreement.
- Maintenance contracts.
- Contracted services from an individual, i.e. freelance work.
- Long term leases, insurance.

(Continued on next page)
- Reimbursable and personal expenses of employees including travel (airfare, mileage) hotel accommodations, entertainment, meals, and other out-of-pocket expenses.
- Orders requiring advance payment.
- Subscriptions, Memberships or Advanced Registration Fees.
- Any NPOR (No Purchase Order Required) item i.e., Moving Expenses, Personal Reimbursement to University Employees, Postage, Physical Examinations, Superintendent of Documents, Safety Glasses/Shoes, Taxi Service, Telephone Reimbursements, Tuition Refunds/Waivers, Utilities, Temporary Services, Cadavers, Scholarships, Loans, Grants, Awards, Delivery Charges if not billed directly from Delivery Service (Fed Ex, UPS, Airborne, DHL, etc.).

If in doubt, contact Fast Track/Purchasing
645-2676
I. RESPONSIBILITY OF DEPARTMENT

To place your order with a supplier:

Department must ensure that the supplier can comply with all terms and conditions of the Speed Order prior to the placement of an order. Such terms and conditions would include:

➢ The ability to ship FOB destination or prepay and add shipping charges.
➢ Must be able to ship directly to the requisitioner via their truck, UPS, etc., not via Helm Warehouse (note that the Speed Orders should not go through the Helm Warehouse).
➢ The ability to include and use the Speed Order Number on all documentation.
➢ The ability to send invoices directly to the ordering department – not Accounts Payable.

It is the responsibility of the department to:

➢ Purchase only goods or services allowed under NY State Law. When in doubt, please call Purchasing at 645-2676.
➢ Verify that funds are available before placing the order.
➢ Conduct any and all negotiations with the supplier for replacement of damaged or incorrect goods or services, all discrepancies regarding the order including duplicate shipments. The Purchasing Department will provide advice as necessary.
➢ Follow up with the supplier on delivery time of materials.
➢ Inspect all orders upon delivery to ensure the order is complete as ordered and no items are damaged.
➢ Verify receipt of goods by signing Departmental Certification of Receipt on the Speed Order Form.
➢ Date Stamp the original invoice (packing lists and statements cannot be used for payment) on the day it is received.
➢ If the Speed Order amount does not match the invoice amount, adjust Speed Order to match invoice amount.
➢ Forward the yellow purchasing copy along with the original invoice to Purchasing immediately upon receipt of invoice.
➢ Retain pink copy and copy of invoice for departmental records.
➢ FAX, Telephone, Mail or directly provide the white copy to the Supplier.
➢ If the white copy is mailed after order is faxed or phoned in, mark “Confirming, DO NOT Duplicate”.
➢ Retain all order documents on file for a period of 3 years (current year plus 2 previous years).

➢ New York State Finance Law requires that an invoice is date-stamped on the day it is received by the designated payment office. When the invoice is sent to your department, as instructed on Speed Orders, your department is the designated payment office. Therefore, all invoices must be date-stamped prior to sending to Purchasing.
TAX EXEMPT INFORMATION

All purchase orders from the State University of New York at Buffalo are exempt from New York State local sales taxes. **Do not include sales tax in payment total.** The Supplier may need to be presented with documentation stating purchaser is a New York State governmental entity. Form **AC-946** may be obtained on our UB Business web site at [http://ubbusiness.buffalo.edu/ubb/cfm/forms/](http://ubbusiness.buffalo.edu/ubb/cfm/forms/). Click on Tax Exemption Form AC946; enter your UB IT username and password and print form. If further proof of tax exempt status is required by the supplier, call Purchasing for assistance.

THE PROCESS

Speed Order forms are pre-numbered. They are a three-part form; white copy to supplier, yellow copy to Purchasing, pink copy to department. The forms will be issued to authorized individuals only, and must be held in a secure, restricted area. The authorized person shall be responsible for the tracking and control of the Speed Order forms being used. The departmental copies of these Speed Order forms along with copies of invoices must be maintained in a designated/labeled area of your department, in numerical order (including voided forms), for a period of two years as they are subject to audit. Yellow copies and original invoices are maintained in Accounts Payable for a period of seven years.

AUDIT

All Speed Order System transactions are subject to review by Internal Audit and State Auditors and must comply with sound business practices and State regulations as outlined in these guidelines.

COMPLETING THE FORM

The Speed Order form should be filled out completely. It is incumbent upon the requisitioner to ensure that the supplier has materials and supplies available and that the department has monies available to complete the order. The ordering department should obtain product information, including the current unit price and complete description of the item. The ordering department should obtain the correct vendor name, address and Federal ID number.

The box located on the Speed Order indicating the Speed Order number will contain an additional number to designate the fiscal year being paid. At the beginning of each fiscal year, Purchasing will advise departments of the number to be used.
TRADEMARKS & LICENSING

Orders placed for printed items representing the University in any way, UB Logo or individual department, should be pre-approved from Trademarks and Licensing and a copy of the approval should be attached along with invoice to the Speed Order.

PLACING ORDERS

- Departments should always ask for the best educational price, including all discounts.
- Departments should place orders with minority-or-women-owned suppliers whenever possible. The Purchasing Department can provide assistance or a listing of certified suppliers.

FAX OR TELEPHONE ORDERS (CONFIRMING)

Departments may place their Speed Order via FAX or telephone to a supplier after first obtaining correct pricing and delivery information. If the vendor copy (white) is sent to Supplier after ordering via fax or phone, be sure to BOLDLY mark the order, “CONFIRMING, DO NOT DUPLICATE” on the form to prevent a duplicate shipment.

ORDERS BY MAIL

After obtaining the correct item and delivery information from the supplier, mail vendor (white) copy of the Speed Order to the supplier. Verify that the order will be shipped directly to the department. Upon receipt of goods and invoice, the department signs and sends Purchasing (yellow) copy along with original invoice to the Purchasing Department. Retain pink copy for your departmental records.

PICK UP ORDERS

In rush situations and if the supplier is willing, the department can go directly to the supplier’s place of business and pick up the necessary goods using a Speed Order form. All copies of the form should be filled out with correct pricing, descriptions and signature before the transaction takes place. The supplier is to receive the white copy. They can invoice at the point of pick up or mail the invoice directly to the department. The department representative signs and sends Purchasing (yellow) copy along with original invoice to Purchasing, keep pink copy and copy of invoice for your departmental records.
Improper Use of Speed Order System

Misuse of the Speed Order System will be referred to the Director of Purchasing for disposition. Departments will be notified by Purchasing if they have violated the State rules and regulations. Authorization for the Speed Order System may be withdrawn for abuse.

II. Responsibility of Purchasing

It shall be the responsibility of the Purchasing Department to:

- Provide training sessions for all departments wishing to use the Speed Order System.
- Provide a Speed Order System Kit, including authorization forms; log forms and labels for maintenance of files. Actual Speed Orders will be distributed after authorization forms are submitted to the Purchasing Department.

The Purchasing Department has the final authority and responsibility to commit the State of New York to the transaction. By their signing, an authorized agent verifies that the transaction is a proper State expenditure. The authorized agent will verify supplier data, add the required coding, and sign the yellow Purchasing copy as approved. All incomplete Speed Orders will be returned to the department for completion.

After review and approval, the Speed Order will be entered into the Albany system with a general category and total dollar amount. No purchase order will be printed. Purchasing will forward the yellow copy and original invoice to Accounts Payable/Fast Track for payment.

Purchasing will be available at any time for assistance, training or retraining of individuals.