Other WD 33 Procurement Changes

• Close Purchase Order Lines for Invoicing
  – Used to avoid additional receipts AND invoices
  – Liquidates remaining line obligation
  – Lines can be reopened within the FY if closed in error

• PO Close Reasons
  – Account Closed/Expired
  – Incorrect Account
  – Incorrect Supplier
  – Liquidate Line
  – Liquidate PO
  – Product Discontinued
Have you registered yet?

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DISCOVERING MAGIC IN THE PROCESS
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Changes to Purchasing Agent Certification

• New Applicants
  – Applicant must attend the **Procurement Institute Training Session** and **2 of 4 sessions** listed below.
    • Spec, Specs & More Specs Session @ Summit
    • Workshop: Complex Specs for a Simple Purchase @ Summit
    • Specs 101 and Complex Specifications
    • Department Solicitations
  
  *Note: Individual must physically attend & stay the duration of the session to receive credit.*

  – Department Solicitations Session now **required** if Level 2 Delegation Requested.
Changes to Purchasing Agent Certification

• Recertifying Delegates
  – Delegate must renew certification within **12 months of approval date** by obtaining a minimum of 5 credits at the following events:
    • Procurement Bi-monthly Roundtable Meetings (max 3 credits/year)
    • Procurement Training Sessions (1 credit each)
    • Procurement Hosted Supplier Expos (1 credit/year)

  *Note: Individual must physically attend & stay the duration of the event to receive credit.*

  – Delegate must complete and submit the **Delegation Renewal Form** to Procurement Services.
Procurement Sessions @ Summit

• Contract Management 101: Planning & Procurement
• Contract Management 102: Monitoring & Oversight
• Department Solicitations
• Managing Supplier Contracts
• Specs, Specs and More Specs
• Strategic Sourcing
• Workshop: The Bid Game
• Workshop: Complex Specs for a Simple Purchase
• Workshop: Sole source Procurements
Other PAC Changes

• Delegate must attend any mandatory training as determined by the CPO in order to stay abreast of all policy, procedures and process changes.

• Notes:
  – The Procurement Institute will be offered every other month.
  – The additional courses will be offered in the opposite months.
  – The Procurement Institute is a pre-requisite for all seeking delegation.
Delegation Questions

Email:

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