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About Materials Management and this Guide

The Department of Materials Management is responsible for making all purchasing contracts entered into for the University. We are here to guide you through the purchasing process for all your department’s purchasing needs whether it’s every day office supplies, equipment, or services. This guide is intended to assist in the understanding of the University’s procurement process and how Materials Management can assist you and your department in obtaining the goods and services needed to operate and carry out the mission of East Carolina University. It does not reflect all policies or procedures required for purchasing but will provide an overview of all the functions of Materials Management including the purchasing methods, basic purchasing processes, the University Storerooms, the Surplus Property Office, and the Fixed Assets Office. Do not hesitate to give us a call when you need assistance.

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<td>Materials Management-Purchasing</td>
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</tr>
<tr>
<td>West Campus FedEx/UPS &amp; Gas Cylinder</td>
<td>744-3316</td>
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<td>Office of Research Integrity and Compliance (ORIC)</td>
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</tr>
<tr>
<td>Vendor Coordinator</td>
<td>737-1098</td>
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</tbody>
</table>
Purchasing Responsibility

As a State-supported institution, East Carolina University must follow the regulations and purchasing policies set forth by the state of North Carolina. The Division of Purchase and Contract, a part of North Carolina’s Department of Administration, has the responsibility for administering the State’s program for the acquisition of property and services where public or grant funds are involved. For most expenditures under $500,000.00, the University is delegated purchasing authority. The Department of Materials Management has the responsibility for administering the purchasing program on behalf of the University while adhering to the policies set forth by the North Carolina Department of Administration, Division of Purchase and Contract at http://www.pandc.nc.gov/Default.aspx.

Outside Charge Accounts

In accordance with the above exclusive responsibility, the following applies to Outside Charge Accounts:

No department or individual employee of East Carolina University is authorized to open or allowed to establish any type of charge account that obligates University funds or obtain any type of credit card for purchasing goods or services without prior approval by the Department of Materials Management. Approval may be requested by the Director of Materials Management, specifying the type of account being sought, a justification and business need, and the funding source. Any requests utilizing Foundation funds require approval by the Financial Director of Institutional Trust Funds/Foundations in addition to Materials Management.

Materials Management reserves the right to deny any outside charge account as deemed in the best interest of the University and in accordance with State guidelines.

Basic Purchasing Principles

Purchasing Authority

ECU Department of Materials Management has the exclusive responsibility for making all purchase contracts entered into for the University (rental or purchase of real property excepted). This authority covers all supplies, materials, printing, equipment, and services.

Ethical Standards

State and University policies prohibit the Purchasing Office from entering into any purchase agreements for personal purchases on behalf of employees. All goods and services purchased remain the property of the State until consumed or disposed of by public sale through Surplus Property procedures. This is regardless of funding source.

NC General Statute 133-32 addresses the legal implications of State employees accepting gifts or favors from vendors. Briefly summarized, this statute states that it is unlawful for any vendor who has a current contract with a governmental agency, has performed under such a contract within the past year, or anticipates bidding on such a contract in the future to give gifts and favors to any employee of a governmental agency who is charged with preparing plans, specifications, or estimates for public contract. It is unlawful for a State employee to willfully receive or accept such gifts or favors. For additional information, see Executive Order No. 24 regarding Gift Bans at http://www.doa.state.nc.us/pandc/documents/ExecutiveOrder24GiftBan.pdf.
When competition is received during the bid solicitation phase of an acquisition, the requesting department will normally participate in the evaluation process. After requests for quotes/bids have been posted or issued by the Department of Materials Management and prior to the award of a purchase order or contract, possession of bid/quote information is limited to University and State evaluating personnel only. Any communication with bidding vendors that may be necessary for the purpose of clarification of a quote or bid must be cleared in advance through the Department of Materials Management.

**Ethical Standards – Avoiding Conflict of Interest**

Conflict of interest relates to situations in which financial or other personal considerations may compromise, may involve the potential for compromising, or may have the appearance of compromising an employee’s objectivity in meeting University duties or responsibilities, including research activities. The bias that such conflicts may impart can affect many University duties, including decisions about personnel, the purchase of equipment and other supplies, the collection, analysis and interpretation of data, the sharing of research results, the choice of research protocols, the use of statistical methods, and the mentoring and judgment of student work. An EPA employee may have a conflict of interest when he or she, or any member of that person’s immediate family, has a personal interest in an activity that may affect decision making with respect to University teaching, research, or administration.

A conflict of interest may be an actual or perceived interest by an ECU employee in an action that results in, or has the appearance of resulting in, personal, organizational, or professional gain. A conflict of interest occurs when an employee has a direct or fiduciary interest in another relationship.

In order to avoid potential "conflict of interest," the University's policy is not to purchase from State or University employees. Further, it is the University’s policy that if a University employee has an immediate family member (husband, wife, mother, father, son, daughter, brother, sister, mother-in-law, father-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law) who is principal owner of a business, the department in which that family member is employed will not be allowed to do business with that firm.

**Essential Exceptions**

If, however, it is essential to purchase materials or services from State or University employees, or from companies in which any State or University employee may have a major interest, a request should be submitted in writing to the Director of Materials Management. The request may be sent from the Director of Materials Management to the State’s Division of Purchase and Contract for final approval by the State Secretary of Administration. The outcome will be documented and the requester notified.

**UNC Policy Manual, Chapter 300, Conflicts of Interest and Commitment Affecting Faculty and Nonfaculty EPA Employees, 300.2.2** http://www.northcarolina.edu/policy/index.php?pg=vb&node_id=283

**Receiving of Goods**

Departments have the responsibility to inspect all materials, supplies, and equipment immediately upon receipt. If any items are missing, damaged, or do not perform to the standards agreed upon, please contact Materials Management immediately and enter a comment on the Purchase Order in PORT to note the issue. Only when all materials, supplies, and equipment are received in satisfactory condition should departments complete the receiving documentation in PORT. Completing the receiving documentation in PORT without physically receiving and inspecting all items for satisfaction is a violation of NC purchasing regulations and ECU policy. It is extremely important for departments to receive the goods in PORT promptly upon delivery (no more than two business days). It is also important that vendors send the invoice directly to Accounts Payable and not to the departments. This will allow Accounts Payable to pay
our bills promptly. If a department receives an invoice, send it immediately (no more than two business days) to Accounts Payable and please instruct the vendor to send any future invoices to Accounts Payable. For more information on receiving goods in PORT, please visit http://www.ecu.edu/cs-admin/purchasing/port/PORTTrainingProcedures.cfm

Scams
ECU faculty and staff should be aware of an on-going problem with unauthorized supplier representatives using questionable business tactics to market "special promotions", "limited time offers", etc. for copier toner, office supplies, maintenance items, etc. These telemarketers attempt to scam the University by convincing faculty and staff to order or approve shipments of goods based on the misperception that they are a University approved supplier. These supplies are usually of inferior quality and priced significantly higher than fair market value from University approved suppliers. Some of their questionable business tactics include:

- Phone calls about renewal orders never placed
- Invoices for goods never shipped
- A deadline for special promotion or sales
- Pre-authorization for a future shipment
- Phone calls to send FREE samples of toner
- Bogus email order confirmations
- Fictitious invoices for services or items never requested or received

To help the University community stay on guard against these telemarketing suppliers, Materials Management has found some useful tips to help faculty and staff avoid being swindled.

How to Avoid Scams
Faculty and staff should take the following steps to avoid falling victim to the supplier's scams:

- Watch out for fake "invoices" that do not reference an ECU purchase order number or that were not generated by an official ProCard purchase.
- Watch out for telemarketers that call you directly with "limited time offers". Don't order from a supplier calling you!
- Order your supplies from state contract suppliers.
- Never give out your ProCard information to unknown suppliers.
- Report any problems directly to Materials Management.

What to Do if You Become a Victim of a Scam

1. Receiving calls from individuals claiming to be representatives from toner companies:

- They will usually ask for your copier model and serial # or they may know it and ask you to verify it. Say, "I'm not authorized to accept your products" and hang up or transfer them to Materials Management (328-6434). Never give them any information or verify any information.

2. Receiving unsolicited toner, other items, or invoices for services or items never requested:

- If possible, get as much information off the label and refuse the box from the delivery service. Then call Materials Management.
• If you end up signing for the items, DO NOT OPEN. Contact Materials Management with as much information as possible (company, address, etc.) and to receive further instruction.
• Forward all documentation to Materials Management

Please communicate these guidelines to your faculty, staff, and student employees. If you have any questions or concerns, please contact Materials Management at 328-6434.
Purchasing Methods

There are a number of different purchasing methods which can be used for acquiring goods and services. Remember that we can only track shipments which have assigned purchase order numbers.

**Purchasing Card / ECU ProCard**

Procurement Cards are issued to permanent ECU faculty or staff and are to be used only by the named cardholder. The purchasing card is essentially a corporate VISA card for business use only that allows rapid purchase of low dollar goods. Liability rests with the University instead of the individual cardholder. Individuals with approval by their Dean or Department Head may apply for a card and are required to attend a ProCard training session and sign a card use agreement. All state purchasing rules and regulations and University policies apply to ProCard transactions. Please see [http://www.ecu.edu/cs-admin/purchasing/pcard/ProCardHome.cfm](http://www.ecu.edu/cs-admin/purchasing/pcard/ProCardHome.cfm) for more information.

**Purchase Requisition (PORT)**

PORT (Purchase Order and Requisition Tracking) is the purchasing system for East Carolina University. Users access PORT for creating, tracking, and/or approving requisitions. The ECU PORT system makes the process of purchasing quick and convenient through its browser-based screens. Online catalog shopping, placing requisition requests, purchase order tracking, order history, and other features help departments keep track of their spending. Online approvals and electronic distribution of purchase orders to vendors reduces processing time, and paperwork, and provides a cost savings to the University.

Requisitions are transmitted via the PORT (Purchase Order & Requisition Tracking) system to Materials Management to request goods and services. Requisitions require departmental and divisional approval in accord with established workflow. Sometimes Grants and IT approval may also be necessary. Once a pre-audit review is complete, the assigned Purchasing Specialist in Materials Management will issue a purchase order for requisitions that are $5,000.00 and less ($3,000 or less for Grant-funded requisitions) or on State Term Contract. If the total order is over $5,000.00 ($3,000 for Grant-funded) and not on State Term Contract, informal bids are solicited and awarded to the low qualifying bidder. Please refer to the [How-To](http://www.ecu.edu/cs-admin/purchasing/port/PORT.cfm) sections of this guide for guidelines.

**Note:** A purchase order should be obtained prior to placing the order or prior to any request for services.

PORT training and Banner Security are required before a user can be granted access to PORT. Training dates and registration is available via Cornerstone Employee Training on ECU OneStop. Additional information and procedures for entering a requisition are available in the PORT Manual at [http://www.ecu.edu/cs-admin/purchasing/port/PORT.cfm](http://www.ecu.edu/cs-admin/purchasing/port/PORT.cfm).

**Contractual Services Payment Request Form**

The Contractual Services Payment Request Form is used to pay for services associated with a contract and is initiated by the contracting department to approve payment to an independent contractor performing a specified professional service. This form is utilized to reimburse non-university professional individuals for services rendered to the University that qualify to be classified as an Independent Contractor. Additional information is in the [How to Buy Personal Contract Services (Independent Contractors)](http://www.ecu.edu/cs-admin/purchasing/port/PORT.cfm) section of the guide.
Banner Direct Payment Form
The Banner Direct Payment Form is used to process payment for approved expenses, which do not require a PO and were not paid on a ProCard. This manual form is also used to request employee reimbursement when his/her personal money was spent for an official University business expense. It should be noted that the ProCard is the preferred alternative payment tool in lieu of reimbursements. Instructions and a list of approved expenses can be found on the Accounts Payable website at http://www.ecu.edu/cs-admin/financial_serv/accountspayable/index.cfm. Completed forms (including required signatures) are sent directly to Accounts Payable for processing after proper approvals.

Note: Employee reimbursements – reimbursements of $500 or more for items not included on the “Approved Expenditure” list will require approval by Materials Management before the purchase is made. The Direct Payment Form must be sent to Materials Management for approval before submitting to Accounts Payable for payment. (This requirement does NOT apply to purchases from Foundation funds.)

Purchases from University Storerooms
All University Storeroom catalogs are available in PORT. A requisition should be entered and submitted to the appropriate storeroom via PORT. Instructions for entering a campus requisition can be found on the Storeroom websites at http://www.ecu.edu/cs-admin/purchasing/centralstores/CentralStoreroomHome.cfm or http://www.ecu.edu/cs-admin/purchasing/medicalstoreroom/MedicalStoreroomHome.cfm.

PCI/Payment Cards
East Carolina University is subject to the rules, regulations and contractual provisions regarding the handling of payment cards and cardholder data as defined by PCI/Data Security Standards (PCI/DSS). If your department would like to accept payment cards, purchase new software which processes payment cards, order POS terminals, or request a U-store, please contact Robin Mayo, eCommerce Manager, at 737-4729 or ecommerce@ecu.edu prior to entering in ANY agreement with a vendor or making purchasing decisions. For more information, please visit http://www.ecu.edu/cs-admin/financial_serv/pci/index.cfm.
Expediting the Purchasing Process

After you have checked on-campus resources for immediate availability of the supplies and services needed, there are some things you can do to expedite the purchasing process for many of your routine needs and some extraordinary steps which can be taken for emergency or pressing needs. Review the Pre-Purchasing Checklist to determine if you will need to contact specific ECU departments prior to making your purchase. Purchases that may cause health and safety issues, require modifications to buildings, etc. will need to be reviewed by the appropriate departments.

Plan Ahead
We encourage you to plan ahead for your needs. However, if you need to have your requisition handled as a priority, you should flag your requisition as URGENT. This should only be used when appropriate and should be communicated with a Purchasing Specialist in Materials Management ahead of time. Purchase orders $5,000.00 or less can normally be issued within 24 hours after receipt of approved requisition by Materials Management. Orders $5,000.01 to $500,000.00 are subject to bid and may take up to 20 days. Orders $500,000.00 and above are bid and awarded by the Division of Purchase and Contract, which takes 30 – 60 days.

Note: Materials Management reserves the right to obtain quotes or process a bid document for any order as deemed appropriate.

Emergency Purchases vs. Pressing Need
The NC Agency Purchasing Manual defines “pressing need” and “emergency” as follows:

- **Pressing need** - a need that arises from unforeseen causes, including but not limited to, delay by contractors, delay in transportation, breakdown in machinery, or unanticipated volume of work
- **Emergency** - a situation which endangers lives, property or the continuation of a vital program and which can be rectified only by immediate on-the-spot purchases or rental of commodities, printing or services

In either case, the department should contact Materials Management prior to any purchase for guidance and proper handling of the order whenever possible. If an emergency occurs during non-business hours, contact Materials Management on the next working day so the incident can be noted and the file can be documented.

If you have a true emergency, please contact Materials Management at 328-6434 immediately for a needs assessment. If warranted, measures will be taken to honor the request.

Vendor Setup
In certain situations, it may be necessary for a department to request a vendor be setup so that they can initiate a requisition or submit payment to the vendor. To initiate a vendor request:

- Log into OneStop
- Under Tools, Select Submit Vendor Request
- Complete the Online Form
- Before submitting the form, you have to select the Disclosure Statement radio button. This indicates that you have complied with ECU policy by providing the company or person with a copy of SSN/FEIN Disclosure Statement [http://www.ecu.edu/cs-admin/purchasing/upload/MM_Disclosure_Statement.pdf](http://www.ecu.edu/cs-admin/purchasing/upload/MM_Disclosure_Statement.pdf). In addition, you have to select the vendor form radio button. This indicates that you have provided ECU Vendor Information Form to the vendor [http://www.ecu.edu/cs-](http://www.ecu.edu/cs-)
The vendor will be responsible for completing the form and sending back to Accounts Payable. Note: The vendor will not be created until the form is received by AP. If you wish to request an exception to this process in the event of an emergency, you can contact Accounts Payable or Financial Services. For more information regarding vendor setup requests, please contact Accounts Payable at 737-1079.

**ECU Logos**

Only licensed vendors may produce items featuring university trademarks. A [complete list of licensed manufacturers](mailto:clc@clc.com) is available. If you wish to have a manufacturer added to the list, please contact the Collegiate Licensing Company Inc. at clc@clc.com. East Carolina University is required by law to control the use of its trademarks and control is maintained through allowing only officially licensed manufacturers to reproduce University trademarks. Therefore, items such as apparel and promotional/gift items must use licensed vendors and submit designs for approval PRIOR to production.

Please visit, [University Marketing and Publications](http://www.ecu.edu) for more information.

**Business Associate Agreement (BAA)**

A BAA is necessary for outside entities or individual who are performing services on behalf of ECU or who are performing auditing, legal, or consulting services for ECU who may come in contact with Protected Health Information (PHI). For purchasing request submitted via PORT or Personal Service contracts submitted on the approved template executed by Materials Management, Materials Management will route the request to the proper compliance office for PHI and BAA review. For all the contractual situations, the end using department will be responsible for ensuring contract compliance in coordination with the ECU Compliance office located at Brody. More information can be found at their website [http://www.ecu.edu/hipaa/](http://www.ecu.edu/hipaa/).

For more information on BAAs and to define PHI, please contact BSOM Compliance office at [http://www.ecu.edu/hipaa/](http://www.ecu.edu/hipaa/) or 744-5200.
Purchases less than $5,000

Are the items on State Contract?

- NO
  - If items are not on State Contract, departments can purchase from any vendor that has not been debarred.
  - Debarred Vendors

- YES
  - When items are on State Contract, we are bound by State law to purchase from a State Contract vendor
  - State Term Contracts

Approved Purchasing Methods

- ECU operates two storerooms; Central Campus and Medical Storeroom
  - Central Storeroom offers office supplies, paper, furniture, maintenance-type supplies, housekeeping supplies, batteries, and lamps for convenience.
  - Medical Storeroom offers medical and scientific supplies, gases, and housekeeping supplies for convenience.
  - Catalogs can be found in PORT
  - The storerooms should be utilized when at all possible
  - Central Storeroom
  - Medical Storeroom

University Storerooms

Office Supplies

- The University has convenience contracts for office supplies with Staples, Office Depot, and FSI
  - Catalogs are located in PORT
  - Purchase via a PORT Requisition or ProCard through PORT

ProCard

- Encouraged for low dollar items
  - Card is issued in the name of the employee but charges are billed to the University
  - Fast, efficient, and convenient method
  - Purchases like registration fees, membership dues, subscriptions are required on the ProCard when applicable
  - Transactions are viewed electronically and hardcopy statements are sent monthly to cardholders
  - Each transaction is charged to a default Banner FOAP but codes can be changed, reallocated, or split coded
  - ProCard Homepage

PORT Requisition

- Department enters requisition into PORT
  - Requisition moves through workflow for approvals
  - Enters MM queue and is assigned to buyer
  - Buyer reviews and approves
  - PORT sends purchase order to vendor (fax or email)
  - Vendor fulfills order and sends invoice to Accounts Payable
  - Department receives goods, completes receiving in PORT
  - Accounts Payable pays invoice
  - PORT Homepage

Banner Direct Pay Form

- Used to pay approved expenditures which do NOT require a University purchase order or when the ProCard is not accepted by the vendor
  - Form is submitted to Accounts Payable after proper approvals
  - Approved expenditures include: Memberships, dues, utility bills, subscriptions, Interlibrary loans, postage, FedEx, food services, etc (see link for complete list and instructions)
  - Employee reimbursements - reimbursements of $500 must have Materials Management approval BEFORE purchase is made. Does not include purchases from Foundation Funds
  - Accounts Payable Banner Direct Pay Instructions
Purchases greater than $5,000

Are the items on State Contract?

NO

Approved Purchasing Methods

- If items are not on State contract, the bid process will apply
  - See Understanding the Bid Process

- When items are on State Contract, a state contract vendor must be selected
  - Department enters requisition into PORT
  - Requisition moves through workflow
  - Enters MM queue and is assigned to buyer
  - Buyer reviews and approves
  - PORT sends purchase order to vendor (fax or email)
  - Vendor fulfills order and sends invoice to Accounts Payable
  - Department receives goods, completes receiving in PORT
  - Accounts Payable pays invoice

YES

- Purchasing Specialist from Materials Management will work with department to create specifications for items or service
  - Bid is posted to the NC State IPS website for 10 days
  - When bid closes, the buyer will open the bids and tabulate
  - Purchasing specialist sends lowest bids to department for evaluation
  - Department sends purchasing specialist recommendation of award
  - Purchasing specialist reviews the recommendation
  - See Understanding the Bid Process

- When items are on State Contract, we are bound by State law to purchase from a State Contract vendor
  - State Term Contracts

PORT Requisition

- Department enters requisition into PORT
- Requisition moves through workflow
- Enters MM queue and is assigned to buyer
- Buyer reviews and contacts department to discuss bid process
- PORT Homepage

Bid Process

- Purchasing Specialist from Materials Management will work with department to create specifications for items or service
- Bid is posted to the NC State IPS website for 10 days
- When bid closes, the buyer will open the bids and tabulate
- Purchasing specialist sends lowest bids to department for evaluation
- Department sends purchasing specialist recommendation of award
- Purchasing specialist reviews the recommendation
- See Understanding the Bid Process

PORT

- Purchasing specialist issues a purchase order using the originally created requisition
- Awarded vendor provides goods or services
- Department receives goods or services, completes receiving in PORT
- Accounts Payable pays invoice
How to Buy Goods (non-IT)

The University's Materials Management Department has exclusive responsibility for making all purchase contracts entered into for the University with the exception of rental or real property. This includes all supplies, materials, printing, equipment, and services.

- **Examples of Goods:**
  - Audio Visual
  - Office Supplies
  - Paper
  - Furniture and Office Furnishings
  - Scientific Supply and Equipment
  - Medical Supply and Equipment
  - Recreational/Athletic Equipment

**State Term Contracts**

The State has entered into contracts for goods and services with various vendors at competitive prices. Some State contracts are mandatory and some are provided as a convenience. The University is required to purchase items provided by mandatory State Term contracts when applicable.

For contract listing, see: [http://www.pandc.nc.gov/StateWideContracts.htm](http://www.pandc.nc.gov/StateWideContracts.htm)

**Guidelines**

Materials Management operates by the rules and guidelines set forth by the State of North Carolina Purchase & Contract Division of the Department of Administration.

<table>
<thead>
<tr>
<th>Dollar Value</th>
<th>Rule</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>$.01-$5,000</td>
<td>State Term Contracts if applicable; if the item is not on State contract, choose one of the following:</td>
<td>Even though competition is not required, all purchases must be made via a requisition in PORT. The ECU ProCard is also an approved purchasing method for authorized expenditures up to the cardholders single transaction limit.</td>
</tr>
<tr>
<td>Small Dollar Purchases ($0.01-$3,000 for Grant Purchases)</td>
<td>1. University Storeroom (PORT) 2. University convenience contracts (PORT) 3. Any non-barred vendor</td>
<td></td>
</tr>
<tr>
<td>$5,000.01-$25,000 Informal Bids ($3,000+ for Grants)</td>
<td>1. State Term Contracts if applicable; if the item is not on State contract an informal bid process will be required.</td>
<td>A requisition must be entered into PORT.</td>
</tr>
<tr>
<td>$25,000.01-$500,000 Formal Bids</td>
<td>1. State Term Contracts if applicable are mandatory; if the item is not on State contract a formal bid process will be required.</td>
<td>A requisition must be entered into PORT.</td>
</tr>
<tr>
<td>Over $500,000 P &amp; C Bids</td>
<td>1. State Term Contracts as these are typically mandatory, if the item is not on State contract a formal bid process by State Purchase &amp; Contract will be required</td>
<td>A requisition must be entered into PORT.</td>
</tr>
</tbody>
</table>

1Dollar Value includes shipping, freight, and any other applicable fees.
Only Materials Management is authorized to issue purchase orders. Departments must submit a requisition into PORT PRIOR receiving goods from suppliers. Purchase orders are legally binding agreements with the vendor and the University and only Materials Management has the authority to sign these agreements.

Departments shall not divide orders in attempt to keep them under the $5,000 small purchase threshold, and thereby avoid the rules requiring the applicable method for competition.

**Paper**

Paper is on State term contract and is stocked in a variety of colors, weights, and sizes in the ECU Central Storeroom. Order one ream or an entire case and it will be delivered the next day. See the ECU Office Supply Catalog in PORT.

Standard 8.5” X 11” white copy paper-Order # 445-12732

**Office Supplies**

Office supplies are on State term contracts. Staples, Office Depot, and Forms & Supply (FSI Office) all have various office supplies at competitive pricing. There are three ways to order office supplies

**PORT**

Forms and Supply, Inc. (FSI Office), Office Depot, and Staples punch-out catalogs are available in PORT. Orders are entered online in PORT and are transmitted directly to the vendor upon completion of required approvals (approval workflow is determined by each Division). These requisitions do not come to Materials Management. Purchase orders are indicated by a number that starts with “ST” (i.e. ST010970) and internal journal entries are processed to charge these expenses to the end-users FOAPAL code. Orders that are placed by 3 pm are bulked shipped to the ECU Central Storeroom, unpacked, and delivered directly to departments within 24 hours. Minimum order requirements may apply.

**Central Stores’ Catalog Orders**

PORT users can access the Central Stores’ Office Supply catalog online to place orders for stocked items. The office supply catalog is located in the ECU PORT Marketplace window of the Home/Shop page in PORT. To shop by category, select the East Carolina University Office Supply icon, enter an asterisk (*) in the search box, and click on search. Office supply items stocked in Central Stores are listed by category in the bulletin board on the left side of the page where additional search features are located.

**ProCard**

ProCard users can also place and pay for orders directly through [www.stapleslink.com](http://www.stapleslink.com). All ProCard users may register and process office supply orders directly on the web at [www.StaplesLink.com](http://www.StaplesLink.com). These orders are also transmitted electronically with a 24-hour delivery for orders placed before 5:00 p.m. and are paid via the user’s ProCard. A priced packing list is sent with each order and is processed on the ProCard like any other statement. The user has all the benefits of reallocating these charges online in WORKS to different FOAPs as needed. To use this site you must register for a User ID and Password. These steps should be taken to register as a new user:

1. Go to [http://www.stapleslink.com](http://www.stapleslink.com)
2. From the Welcome page click on “Register”
3. Complete the fields marked with a red asterisk (*)
   - a. For “FRS Numbers” enter 123456 in the first block only
b. Your supervisor's name and email is required. He or she will receive an email asking approval to set up your ID (this is a one-time process).
4. Click “Register” when you have entered your information
5. You will receive an email from Staples with the Company ID, and your User ID and Password
6. When you “submit” your first order you will be asked to indicate a Payment Option. You should select credit card, VISA, enter your ProCard number and expiration date, and you can save this data to your profile for the next time you place an order.

If you have already registered with StaplesLink, you may go directly to the site at www.StaplesLink.com and enter the following info:

1. Company ID: 1010343ATL
2. User ID: (as assigned to you)
3. Password: (as assigned to you)
4. If you can’t remember your User ID and Password, click “Forgot your ID and/or Password”, enter your email address and click “submit”. You will receive an email from Staples with this information.
5. The next time you visit www.StaplesLink.com, the company ID should populate automatically for you.

Note: The local Office Depot and Staples stores are retail shops and not contract sites. The local stores should only be used in cases when you are purchasing non-contract items or when you find yourself in a bind and a 24-hour turnaround is not sufficient. The local stores should not be your primary source for office supplies. Additionally, officedepot.com and staples.com are general consumer retail websites and are not contract sites for East Carolina University.

**East Carolina University Storerooms**
Office furniture is also available from the ECU Central Storeroom. Items like bookcases, chairs, desks, and filing cabinets are carried in stock. Visit the ECU Office Supply Storeroom catalog in PORT.

ECU Central Storerooms stocks a wide range of Maintenance Supplies. Plumbing, electrical, building supplies, grounds, garage and automotive, heating and conditioning, and housekeeping supplies are stocked and can be purchased through PORT.

The ECU Medical Storeroom supplies medical and scientific supplies, gases, and housekeeping items. Please visit the catalogs in PORT.

**Printing**
The purchasing procedures for printing are the same as other commodities/services. For print jobs exceeding $5,000, competition and the bid process will be required. It is critical that departments allow sufficient time for Materials Management’s bidding requirements and print vendor delivery times to ensure printing is performed in a timely manner.

Any work provided by University Printing and Graphic (UP&G) does NOT require bidding or Materials Management’s approval. Materials Management strongly encourages their use for your printing needs.

**University Printing and Graphics**
Copiers
CopiServ is a copier management system in place at East Carolina University. This service allows departments to eliminate the need to purchase a copier and maintain a service contract. It also reduces the need to stock and keep inventory of paper and toner. CopiServ is the program of choice on campus! Contact CopiServ at 328-2326 or visit http://www.ecu.edu/cs-admin/upg/copiserv.cfm for more information.

HUB Vendors
A vendor may be classified as a HUB (Historically Underutilized Business) vendor if their business is minority-owned, female-owned, a disabled business enterprise, or a non-profit workshop for the blind or severely disabled. Departments are encouraged to solicit competition from small and historically underutilized businesses when making any purchase.

If questions arise on proper procedure, the Materials Management Department is available for clarification and assistance.

Animals
All living vertebrate animals must have Comparative Medicine approval PRIOR to purchase. All rodent, rabbit, and other traditional laboratory animal purchases must be placed by Comparative Medicine. Live animal purchases are prohibited on the ProCard. For more information, please contact Comparative Medicine at (dcm@ecu.edu) or 252-744-2420.

Radioactive Materials
The possession and use of radioactive materials by the University is authorized by the State of North Carolina, in agreement with the U.S. Nuclear Regulatory Commission. Permission to obtain and use radioactive material is granted to a faculty or staff member who can demonstrate, through training and experience, that these materials will be used in a safe and proper manner consistent with all regulations. This permission is granted to a qualified faculty or staff member upon an application to and approval by the University Radiation Safety Committee. The Committee also empowers the Radiation Safety Officer to ensure compliance with regulations, and carry out the administrative duties of the Radiation Safety Program at the University.

For more information contact, the Radiation Safety Office at 744-2070 or visit https://www.ecu.edu/cs-dhs/prospectivehealth/radiation.cfm.

Propelled Equipment
Any propelled equipment purchases (lawn mowers, golf carts, etc.) must be reviewed by Facilities Services prior purchase.

Product Safety Listing
All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization; such as the American Society of Mechanical Engineers for pressure vessels; the Underwriters Laboratories and/or National Electrical Manufacturers’ Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type of device offered and furnished. Further, all
items furnished shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.

The following link has been provided to access this information,


**Water, Beverages, and Coke Products**
Coca-Cola Bottling Company Consolidated has exclusive pouring rights on ECU’s campus and all efforts need to be made to ensure that the University honors this contract.

Dasani (Coke) water is available through our Central Stores in 16 oz bottles in cases of 24 and can be purchased through PORT. Water must be for University business purposes only and not for personal consumption by faculty and staff.

*All water, sports drinks, and soda products purchased for University business must be Coke brand products and approved by the appropriate funding or budget office prior to purchase.*

Any questions about this process or purchasing beverages should be directed to the Department of Materials Management (252)328-6434.  [http://www.ecu.edu/purchasing/](http://www.ecu.edu/purchasing/).
How to Buy General Services or Consulting Services

The University’s Materials Management Department has exclusive responsibility for making all purchase contracts entered into for the University with the exception of rental or real property. This includes all supplies, materials, printing, equipment, and services. For the application of purchasing rules, services are divided into three categories: general services, personal services, and consultant services. General and consulting contracts are subject to the rules of competition. Procurement is initiated by submitting a purchase requisition and detailed specifications if required. Contact the Department of Materials Management for assistance in preparing a formal Request for Proposal to obtain competition.

- Examples of Services:
  - Consulting
  - Dining
  - Janitorial
  - Maintenance
  - Porta Potty
  - Printing
  - Repair
  - Translation Services
  - Uniforms
  - Security

Things to Consider When Purchasing Services

Type of Service Required
A full statement of work; what is it a vendor needs to do for a department.

Type of Maintenance Contract Required
A full statement of work for the type of maintenance required as well as the current maintenance contract from the vendor.

A statement of work should include nomenclature of the item, make, model, serial number, location, person to contact and phone number.

Total Dollar Value of Contract over a One Year Period
Need to know the total expenditures per year to assist with choosing the proper bid process requires and well as the appropriate approval levels.

Request Start and End Dates
Keep in mind fiscal year and splitting money within a fiscal year.

Funding Source
The type of funds used for the purchase.

Exceptions for Service Contracting

The following are exceptions to the purchasing definitions and rules cited above:

- Architect and Engineering Services or other similar services related to building construction, maintenance and repair are arranged through the University’s Facilities Services Department.
• Installation services which are incidental to the purchase of supplies, materials or equipment are acquired under the same requisition used for equipment or supplies.

• Services provided directly by an agency of the state, federal or local government or their employees when performing service as part of their normal governmental function are purchased through Materials Management; however, competition is not required for such services.

Consulting Services

Services is defined as work or tasks performed by State employees or independent contractors possessing specialized knowledge, experience, expertise and professional qualification to investigate assigned problems or projects and to provide counsel, review, analysis or advice in formulation or implementing improvements in programs or services. This definition includes but is not limited to, the organization, planning, directing, control, evaluation and operation of a program, agency or department. Whenever possible, consulting services shall be obtained from other State agencies when the services available from other agencies substantially meet the reasonable specifications of the requesting agency.

If your department is in need of consulting services, please contact Materials Management 328-6434 for guidance through this process.

Any questions about this process should be directed to the Department of Materials Management (252)328-6434. [http://www.ecu.edu/purchasing/](http://www.ecu.edu/purchasing/).
How to Buy Personal Contract Services (Independent Contractors)

The University’s Materials Management Department has exclusive responsibility for reviewing and executing a Contractual Services Agreement legally binding the University for Personal Services with Independent Contractors.

- **Examples of Personal Services**
  - Performances
  - Speeches
  - Research

**Personal Contract Services**

The Department of Materials Management has a comprehensive website to assist departments with initiating contractual services. *For individuals working more than three days and/or earning more than $5,000, a Personal Contract Services agreement must be initiated PRIOR to beginning work.* Departments should begin the process by:

1) Going to the [Personal Contract Services homepage](#)
2) Obtaining a Banner ID if the independent contractor does not already have one.
3) Reading through the [Important Links](#) and following the [Procedures Used to Initiate Contractual Services](#) link by entering a PirateID and Passphrase.
4) Read through the instructions and then click the link [Contract with IRS Factors](#) at the bottom.
5) Departments must complete the IRS 20 factors by answering the questions regarding the independent contractor to the best of their knowledge.
6) Complete the contract by filling in the required fields and routing for all signatures EXCEPT the independent contractor’s signature. Once the Project Coordinator, Department approval, Grants if applicable, and Human Resources signatures have been obtained, the contract should be submitted to Materials Management. If approved, Materials Management will submit the contract to the independent contractor for signatures.

**Payment**

Once a Personal Services Contract is initiated, Materials Management recommends that the contract be entered into PORT in Contracts Manager. Materials Management will enter the contract and notify the department when the contract has been established in PORT and is available to pay. When the department is ready to pay the individual, a [Confirming Order Do Not Send](#) requisition is entered into PORT and the Contract is linked. This eliminates the need to obtain signatures each time the department requests to pay the independent contractor.

- Non-NC resident individuals/artists providing performances, entertainment, or speeches must be paid via a Contractual Services Payment Request Form and not paid through PORT due to a 4% NC State withholding.

**Contractual Services Payment Request Form**

For services less than three days and/or less than $5,000 during the calendar year or when payment cannot be made in PORT, payment can be processed on a [Contractual Services Payment Request Form](#) along with documentation from the department (memo and invoice). This form should only be utilized
for non-ECU employees or students. ECU employees or student can be paid via this form only for research participant payments.

**Instructions for Completing the Contractual Services Payment Request Form**

**Section 1: Banner ID Number for Payee**
Enter the independent contractor’s Banner ID #. If the independent contractor does not have a Banner ID #, one needs to be requested by going to OneStop/Tools/Employee/Submit Vendor Request and following the instructions.

**Section 2: Contractor/Payee OR COMPANY**
The name must be completed as shown on the form, (First, Initial and Last). The name inserted in this section must be as it appears on the recipient’s social security card. You cannot establish an independent contractual relationship with an ECU or state employee.

**Section 3: Payee’s Address**
Enter the permanent address of the recipient’s residence to include street address, city, state, zip, telephone number and country.

**Section 4: Payee’s Present Employer**
Provide the name of the recipient’s present employer and whether this employer is a N.C. State Agency and whether the recipient has an immediate family member working at ECU.

**Section 5: Employer’s Address**
Provide the address of the recipient’s present employer.

**Section 6: Check Payable**
Indicate who the check should be made payable to if the information is different than what is listed in Section #1.

**Section 7: Program Participating In**
Provide the name of the program in which the recipient will be performing the service.

**Section 8: Dates of Participation**
Enter the dates of services to include the beginning date and ending date. If the services exceed three days per month, a Personal Services Contract must be initiated through Materials Management. A copy is attached for your review.

**Section 9: Types of Services Rendered**
Provide a detailed description of the services rendered by the recipient.

**Section 10: Reason for Selecting This Individual to Perform These Services**
Indicate why this recipient was chosen to perform these services.

**Section 11: Basis of Fee**
Enter the daily rate x the number of days to be paid and the total of all services being paid.

**Section 12: FOAPAL Codes**
This list contains the most commonly used account FOAPAL codes for personal services. Please note this list isn’t all encompassing and others may be used if reasonable. Enter the corresponding FOAPAL code(s) and major Banner Account codes includes the payments to independent contractors, external organizations, and others for professional and consultative personal services engaged on a contractual basis.

<table>
<thead>
<tr>
<th>Account Numbers</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>73001</td>
<td>Legal and Accounting Fees: This minor object includes the professional fees paid to attorneys and accountants for legal and accounting services rendered to the institution.</td>
</tr>
<tr>
<td>73038</td>
<td>Consultant Fees: This minor object includes the fees paid to professional specialists for consultative services provided to the institution. Consultants require approval at the state level.</td>
</tr>
<tr>
<td>73011</td>
<td>Medical Fees: This minor object includes the professional fees paid to hospitals, medical doctors, dentists, nurses, etc. for medical services rendered on behalf of the institution.</td>
</tr>
<tr>
<td>73062</td>
<td>Employee on Loan Payments: This minor object includes the payments to other state government agencies for professional services of borrowed employees subject to the statewide policy on dual employment.</td>
</tr>
<tr>
<td>73064*</td>
<td>Honorariums: This minor object includes the payments to professional persons for services rendered when custom or propriety forbids the setting of fees. *This account code may not be used on grant funds.</td>
</tr>
<tr>
<td>73101</td>
<td>Academic Inst/Res Service: This minor object includes non-payroll payments for instructional and research services performed by individuals who are not State employees.</td>
</tr>
<tr>
<td>73067</td>
<td>Other Contracted Services: This minor object includes non-payroll payments, or fees, to independent contractors, external organizations, and others for professional and consultative personal services engaged on a contractual basis, and not identified by minor objects numbered 73001 through 73101. It includes the costs of contracted secretarial, clerical, instructional, and research services provided by non-employees and critic teachers.</td>
</tr>
</tbody>
</table>

**Section 13: Services Provided For**
Provide the name of the person contracting the services of the recipient, the department the services are being provided for and a phone number where this individual can be contacted if there are questions.

**Section 14: Certification**
Provide the signature and typed name of the person contracting the services of the recipient. This signature certifies that the above services were rendered satisfactorily, that it has been determined that the payee is an independent contractor as defined by the "twenty factor test", and that a contract was approved if more than 3 days and/or exceeding $5,000. Provide the typed name of the person completing the form if different than the person contracting the services.

**Section 15: Certification**
Obtain a signature of the independent contractor. This signature certifies that the independent contractor understands that the University is not required to withhold federal* or state taxes** or social security on payments made to independent contractors, who are NC residents. Independent contractors will be sent a Form 1099-Misc at the end of the calendar year if the payment(s) made during the year aggregate to more than $600.

*Foreign nationals may be subject to Federal withholding taxes up to 30% based on status. Please contact Accounts Payable prior to entering in any contract for further guidance.
Withholding from nonresidents for personal services - North Carolina income tax is required to be withheld from non-wage compensation (personal services income) paid to nonresidents for personal services rendered in this State. The requirement to withhold is 4%.

Section 16: Chair/Director
Provide the signature at unit level by Chairman, Dean and/or Director. This signature certifies that the services and budget were authorized and approved.

Section 17: Vice Chancellor
Provide the signature at division level. This signature certifies that the services and budget were authorized and approved. The division is approved to sign up to their delegated authority amount granted by Materials Management.

Section 18: Human Resources
Provide the signature by the Department of Human Resources. This signature certifies that the payee is not an ECU employee.

Section 19: Foundations
Provide the signature by Foundations (if applicable). This signature certifies that the services and budget were authorized and approved.

Section 20: Grants Administration
Provide the signature by Grants Administration (if applicable). This signature certifies that the services and budget were authorized and approved.

Section 21: Materials Management
Provide the signature by Materials Management. This signature certifies that for services that exceed three days we are covered by a Personal Services Contract to ensure that the University does not experience any liability as a result of this service.

Forms
Personal Contract Services
Contractual Services Payment Request Form

Any questions about this process should be directed to the Department of Materials Management (252)328-6434. http://www.ecu.edu/purchasing/
How to Buy Goods-Information Technology

Computer Hardware Purchases
All computer purchases are placed through PORT. No check vouchers, personal reimbursements, or ProCard purchases allowed. Basic purchasing policies and procedures apply.

Combined Pricing Initiative (CPI)
On July 1, 2010, new purchasing procedures were implemented by UNC General Administration for PC desktop and laptop computers. These new procedures are a required mandate of all of the UNC institutions. This new bulk IT purchasing program is called the Combined Pricing Initiative (CPI). The program was instituted to reduce expenses by taking advantage of the combined purchasing power of the 16 campuses and to meet new requirements of the North Carolina legislation. PLEASE READ the overview of the CPI program at http://www.ecu.edu/itcs/purchasing/cpi.cfm. Contact Greg Hargett at 328-9111 or hargettg@ecu.edu with questions you may have regarding the program.

Current CPI Vendors: Dell • Lenovo • Hewlett Packard (HP)
- DELL Desktop/Laptop and LENOVO Desktop Computers are recommended as the CAMPUS STANDARD.
- ALL Non-Standard and HP Computer Purchases must be submitted through PORT using the COMPUTER REQUEST FORM with an attached quote detailing the configuration of the computer system.
- Dell products are available through a punch-out catalog in PORT or contact the Dell for a quote. Contact Lenovo and HP Higher Education Sales Representatives to obtain a quote.
- Apple Products and Tablets are currently not included in the CPI program.

iPad Purchases
Campus iPad purchases should go through Dowdy Student Store. Please contact Dowdy Student Store computer department at 328-4360 for more information.
*These purchases are allowed on the ECU ProCard*

Adobe Product Purchases
Contact Computer Intelligence Association (CIA) To Purchase Adobe Products.

   Pricing: www.ciacentral.com/ncadobe
   Quote Requests: sales@ciacentral.com
   Order using your ProCard: call Toll free: 1-877-843-2421

CIA accepts both ProCard and Purchase Orders. If ordering through PORT using a Non- Catalog form, the Vendor is set up as Digital Info Serv LLC.
Adobe Creative Cloud
Where possible, users are advised to buy ADOBE software and use it locally or consider alternative products to Adobe subscription cloud tools. UNDER NO CIRCUMSTANCES SHOULD END USERS STORE DATA IN THE ADOBE CREATIVE CLOUD. End Users using Adobe Creative Cloud, or any other cloud service, should be careful not to use the software with any information that is sensitive and that is not considered publicly available IN THE EVENT it stores a copy in the cloud as part of the usage of the product.

*NOTE: Until further notice Adobe Creative Cloud subscriptions may not be purchased using the ProCard. Please obtain a quote from CIA and submit a requisition via PORT for Adobe Creative Cloud subscription purchases.

Computer Software, Accessory and Peripherals Purchases
Basic purchasing procedures apply to all software, accessory and peripheral purchases. Purchases under $5,000 may be made with a ProCard (ProCard policies & procedures apply). Research should be conducted to see if any of the items are on contract prior to purchasing. All software purchases are subject to ITCS approval.

Custom Software
Custom Software Products may require the acceptance of a license agreement prior to use. Software License Agreements (SLA)/End User License Agreements (EULA) are Legal Binding Agreements and should be reviewed by Materials Management. Exception: Packaged Copyrighted Software (i.e. Microsoft, QuickBooks, and Adobe products).

Hosted Software
Software that is installed, hosted and accessed entirely from a remote server or location, typically over the Internet, is considered hosted software and requires an additional review. Vendors offering hosted software are required to go through an ITCS Security Review. Please contact ITCS with questions regarding the Security Review Process or visit http://www.ecu.edu/cs-itcs/itsecurity/thecloud.cfm and/or http://www.ecu.edu/cs-acad/onlinetools/ to review the guidelines affiliated with these purchase types.

Software and Professional Services/Maintenance/License Agreements
In order to ensure that the University is in compliance with the legal requirements of software vendors and service providers, the following process is required when seeking software and software related services.

- Identify need (What software/services are you purchasing)
- Request a quote, license agreement and/or the maintenance agreement from vendor, if applicable.
- Submit a requisition in PORT with the quote, applicable agreements and a justification for the purchase.
- Materials Management will review the justification, license agreement and maintenance agreement for the software/services.
- The request will be forwarded to ITCS for approval, if applicable.
- Once approved, a Purchase Order will be issued to the vendor.

IT Contracts
The office of information technology services has established CONTRACTS for IT RELATED PRODUCTS
MAIN IT CONTRACTS UTILIZED

- 204A – Microcomputers and Peripherals (CPI Rules Apply)
- 204D – Printers and Peripherals
- 208H – Microsoft Select Agreement (Microsoft Products other than what is offered free through ITCS)
  - Information on Microsoft Select License installation can be found on the ITCS Website.

IT Contract Vendors in Port: Govconnection • CDWG • Dell • Apple • Xerox • Lenovo

NOTE: These contracts are mainly convenience contracts and are not mandatory; however, in some cases they offer better pricing with educational discounts along with free shipping and personal service. Contact the Higher Education Sales Representatives listed in the contract for product and pricing information.

Domains
Requests and information regarding domains can be directed to ITCS Infrastructure at 328-9008.

Telecommunications - Cellular, Broadband and Pager Services
Departments are required to order cell/pager service, calling cards, and internet broadband service cards through the ITCS Network Services office.

http://www.ecu.edu/cs-itcs/telecommunications/telecomservices.cfm

Any questions about this process should be directed to ITCS http://www.ecu.edu/cs-itcs/telecommunications/telecomservices.cfm or 328-9866.
How to Buy Apple iTunes/AppStore Purchases

Apple Volume Purchasing
East Carolina University participates in the Apple Volume Purchasing Program (VPP). This program allows departments to create a University approved account to manage its Apple AppStore purchases more effectively and in compliance with NC purchasing rules and regulations. Apple iTunes gift cards are NOT an acceptable method to purchase Apps for department iPads, etc.

How it Works
The Volume Purchasing Program works very much like a regular Apple iTunes account. However, the VPP ensures that purchases are tax-exempt. The VPP also allows departments to purchase multiple copies of Apps sometimes at a discount. Once the Apps are purchased by the department account holder, redemption codes will emailed to the account holder to distribute to the appropriate faculty and staff for download. Users will access the VPP through https://volume.itunes.apple.com/us/store/.

How to Request Access
A department user will need to contact Materials Management to request an account. The person requesting the account will need an ECU email account that has NOT ever been associated with an Apple ID in the past. Accounts cannot be created if the user's email has been associated before. If the user’s email account is unavailable, it is possible to request a department email account through ITCS. The department user will also need a ProCard. This is the only acceptable payment method for Apple AppStore purchases. Once, the department user has an acceptable ECU email account and ProCard, contact Materials Management to request an account. Once the account is created, instructions will be sent by email to the department user.

Any questions about this process should be directed to the Department of Materials Management 328-6434. http://www.ecu.edu/purchasing/.
How to Buy Unmanned Aerial Systems, Drones and Quadcopters

The interest in the use and procurement of Unmanned Aerial Systems (UAS) (commonly referred to as “drones” or “quadcopters”) by ECU faculty and staff has increased over recent years, as has the uncertainty and complexity of the regulatory environment for the operation of such systems.

Regulatory Requirements
East Carolina University and its employees and/or contractors are legally required to obtain the prior approval of both the Federal Aviation Administration (FAA) and the Office of the North Carolina Chief Information Officer (CIO) to use and/or procure (through purchase, manufacture, or otherwise) UAS. Further, applicable North Carolina State law requires any ECU employee operating an UAS to take and pass a test developed by the North Carolina Division of Aviation of the North Carolina Department of Transportation (Division of Aviation) prior to such operation.

ECU Requirements and Procedures
Representatives of the Division of Research and Graduate Studies are engaged with representatives of the State CIO, Division of Aviation, the FAA, and the Office of the University Counsel to ensure ECU’s compliance with laws and regulatory requirements applicable to the use and procurement of UAS by ECU personnel. To facilitate such compliance, ECU has adopted the following requirements and procedures regarding the use and procurement of UAS:

1. It is the policy of East Carolina University that any use and procurement of UAS by University personnel will be in strict compliance with applicable laws and regulations. This includes contracting UAS services from a vendor.

2. The Office of Research Integrity and Compliance (ORIC) is designated by the university to coordinate all approvals for the use and procurement of UAS and/or UAS services. University employees should contact the Director of ORIC (252-744-1971); or the Director of Research Development (252-328-9014) with UAS-related requests PRIOR TO using or procuring UAS and/or UAS-related services.

3. The Department of Materials Management will consult with the Office of University Counsel in advance regarding any request to purchase UAS. Questions regarding the purchase of UAS may be directed to the Director of Department of Materials Management (252-328-6434).

4. Formal written policies and procedures covering the use and procurement of UAS are under development through coordination by the ECU Enterprise Risk Manager (252-737-2803).

The University will continue to monitor and respond to developments regarding UAS. Any questions about this process should be directed to the Department of Materials Management 328-6434.

http://www.ecu.edu/purchasing/.
Enterprise Car Rentals

**The ECU Visa ProCard is NOT approved for payment of rental charges**

The North Carolina Department of Administration has entered into a contract with Enterprise Rent-A-Car which authorizes ECU employees to utilize Enterprise for business use.

Effective January 1, 2011, Enterprise will provide rental vehicles to the ECU motor pool department when a State motor fleet vehicle is unavailable. Details of this new process are highlighted below. We are excited about this new process and expect a significant cost savings for the University.

**Departmental Process**

**Step 1** - Request a motor pool vehicle

**Step 2** - If a motor pool vehicle is unavailable and it is less expensive to receive an Enterprise vehicle versus receiving mileage reimbursement, the ECU motor pool will reserve an Enterprise vehicle for you.

**Step 3** - Once you receive your Enterprise confirmation email, contact the Enterprise Branch at 321-2805 to schedule a time to receive your rental vehicle.

**Step 4** - Charges to your department for the rental vehicle use will process through the Central Motor Pool.

For more information regarding Enterprise and car rentals, please contact Central Motor Pool [http://www.ecu.edu/cs-admin/parkingandtransportation/motorpool.cfm](http://www.ecu.edu/cs-admin/parkingandtransportation/motorpool.cfm) or 328-4005.

For information regarding reimbursement of rental car charges, please contact the Travel Office [http://www.ecu.edu/financial_serv/indextraveloffice.cfm](http://www.ecu.edu/financial_serv/indextraveloffice.cfm) or 737-1084.
Purchasing Gift Cards, Incentives, and Prizes

Purpose
Define and properly document the purchase, distribution, and management of gift cards and gift certificates purchased using any University approved funds.

Definitions/Guidelines
- The purchase of gift cards, gift certificates, incentives, and/or prizes must have prior approval via a completed 
  Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes form.
- Gift cards/gift certificates, etc. may be allowable as prizes for students participating in a University
  sponsored event or an incentive research participation as allowed by the appropriate funding
  authority. Non-monetary incentives may also be allowable in these cases.
- At no time may the Principle Investigator for sponsored projects or any ECU employee use a gift
  card or incentive for personal use.
- Gift cards/gift certificates must be treated like cash and administered with a high level of security.
- The maximum value allowed for a single gift card cannot exceed $100.
- The preferred method of purchase is via ProCard or PORT requisition.
- Stockpiles of gift cards are prohibited. If large quantities of cards are expected to be disbursed
  over several months, one request can be made so long as the department purchases the cards in
  small quantities on an as-needed basis until the total quantity approved is met. This minimizes
  the risk of having unused cards at the end of the project that can’t be returned to the vendor.
  Often gift cards depreciate in face-value after a certain time and could result in loss of funds for a
  department.
- When gift cards are being purchased with grant funds, the following criteria must be met: (1) the
  gift card is for research participant incentive payments only, and (2) costs for such incentives are
  included in the grant’s budget and are allowable by the terms and conditions of the specific grant.
- Gift cards normally cannot be distributed to employees for participant incentives. Payments to
  employees must be made via a supplemental payroll process.
- Gift cards normally should not be purchased by or approved by someone with a family
  relationship to the participant. Whenever there is a family relationship for the participant, that
  should be declared and an arm’s length, unrelated approval process should be implemented.
  Contact OGC or Materials Management for any questions about distributions involving family
  relationships.
- Participants should not receive more than $600 in incentives in a calendar/tax year. If it is
  anticipated that payments will exceed $600, then gift cards should not be processed for that
  participant. The participant should be paid by check, even if the individual payment is for a small
  amount.
- A distribution log for any type of incentive or prize is required. Logs for gift cards should include
  the number of cards purchased, the number of cards distributed, and the number of cards on
  hand. This log should be maintained current at all times. The log is subject to random audit at any
  time.
- Distribution logs deemed confidential should be maintained in accordance with the Office of
  Grants and Contracts Policy and Procedures titled Payment to Research Participant (Human
  Subjects).
Human Subjects/Research Participants

- The Division of Research and Graduate Studies, Office of Grants and Contracts Policy and Procedure titled **Payments to Research Participants (Human Subjects)** applies and may be viewed at [http://www.ecu.edu/cs-acad/grants/upload/Subject-Payments-Incentives.pdf](http://www.ecu.edu/cs-acad/grants/upload/Subject-Payments-Incentives.pdf) regardless of funding source when human subjects are involved.
- UMCRIB approval must be obtained prior to human subject payment of any type.
- A final distribution log should be submitted to the appropriate funding office (i.e. Grants, Student Affairs, and Financial Services) at the end of the project and prior to the end of each calendar/payroll year. December 15 is the deadline for distribution log submissions for the calendar/payroll year in order to allow for proper inclusion for 1099 tax reporting purposes and regulations.

Student Prizes/Incentives

- Special Funds/Student Affairs will verify the appropriateness of the request and sign the authorization form prior to being sent to Materials Management.
- Each student recipient of an award/prize/incentive should sign a Prize Form that includes:
  - Student’s Name
  - Banner ID
  - The Event Name
  - The Event Date
  - Value of Prize
  - The following notification statement to student: 
    I understand and agree that per guidance from the U.S. Department of Education “a monetary award or prize provided by or through the school to a student must be treated as estimated financial assistance” under 34 CFR 673.5, 682.200 or 682.102, and as a result, my receipt of this non-cash prize will be reported to ECU’s Financial Aid Office. (If you have questions regarding how this would affect your financial aid, please contact the Student Financial Services Call Center at 252-737-6886.)
  - Student’s signature and date verifying they understand the notification statement and received the non-cash prize or award
  - Authorized employee’s signature and date
- All distribution logs for student awarded prizes should contain the following information:
  - Student’s name
  - Banner ID
  - Description and value of prize
  - Date prize was given
- All distribution logs (excel document) and copies of the prize forms (.pdf document) should be sent electronically to Dawn Quist, at quists@ecu.edu.
- Distribution logs and prize forms for student awarded prizes must be submitted monthly by the 5th day of the following month. In December, the deadline is December 15th in order to allow for proper inclusion in tax reporting in the proper Calendar year.

Instructions

**Prior Authorization**

A signed **Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes** form is required PRIOR to the purchase of any gift card/gift certificate or other non-monetary incentive or prize. Authorizations are reviewed on a case-by-case basis and are provided for a single intended business purpose (i.e. research study or campus event) as specified in the detailed description and business purpose section of the form. A new authorization is required for an additional project, student, or new
event. If the original intended purpose or intended vendor changes, a new authorization form is required.

All authorizations require the requestors/principal investigator’s signature, the Dean or Department Head of the requesting department’s approval, and that of the funding office.

Materials Management has final approval and can only consider authorizations that are complete and have been funneled through the appropriate channels and signed accordingly.

### Funding Source Requirements

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Department</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant-21xxxx</td>
<td>Grants and Contracts</td>
<td>Kathie Hall</td>
</tr>
<tr>
<td>State-1111xx, 112xxx (West)</td>
<td>Health Sciences Admin</td>
<td>Gary Vanderpool</td>
</tr>
<tr>
<td>State-1111xx, 112xxx (East)</td>
<td>Materials Management</td>
<td>Gift Card Coordinator</td>
</tr>
<tr>
<td>Student Affairs-31xxx</td>
<td>Student Affairs</td>
<td>Dawn Quist</td>
</tr>
<tr>
<td>Special Funds-12xxx, 14xxxx</td>
<td>Institutional Trust Funds</td>
<td>Stephanie Mele, Sharon Cullipher</td>
</tr>
<tr>
<td>Foundation-Exxxxxx</td>
<td>Foundations</td>
<td>Gwen Peaden</td>
</tr>
</tbody>
</table>

For state funds, the *Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes* form will come directly to Materials Management. All other funds should be sent to the contacts listed in the above table prior to being sent to Materials Management.

### Authorization

Once the *Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes* has been approved, Materials Management will notify the requestor via email and will return the form to the department so it may be submitted with the payment method (ProCard statement, etc).

Materials Management will send one copy of the *Authorization for the Purchases of Gift Cards/Gift Certificates, Incentives, or Prizes* to the Grant’s Office, if applicable, and one copy to Kelly Harding, Accountant, for University tracking purposes.

### Documentation

Departments and Principle Investigators are responsible for accurate record keeping including disbursement logs and other documentation that may be required by the funding agency if using grant funds.

- Proof of original purchase is required (i.e. priced, itemized receipt) and should be submitted with the appropriate form of payment. A copy should be kept on file with the department.
- The completed *Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes* must be submitted with the appropriate form of payment. A copy should be kept on file with the department.
- At all times the total of the undistributed gift cards/gift certificates, etc. and disbursement log must equal the total of all gift cards/gift certificates purchased.
- Departments should be prepared at all times to provide a packet of information documenting the authorization, purchase, disbursement, and number of cards or incentives on hand when requested for audit.
**Undisbursed Gift Cards/Gift Certificates, Incentives, or Prizes**

If at the end of the project period a department has any remaining gift cards, prizes, etc., these must be surrendered to Materials Management.

A completed *Surrendered Gift Cards* memo on University letterhead, copy of the original *Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes* form, copy of distribution log, and remaining gift cards must be hand delivered to Materials Management. The final distribution log must be sent to the appropriate funding source.

**Forms**

- Authorization for the Purchase of Gift Cards/Gift Certificates, Incentives, or Prizes
- Surrendered Gift Cards memo

Any questions about this process should be directed to the Department of Materials Management (252)328-6434. [http://www.ecu.edu/purchasing/](http://www.ecu.edu/purchasing/).
Understanding the Bid Process

Purpose
The following information is provided in an effort to help purchasing departments and requisitioners understand the responsibilities and sequence of events that must occur with every bid required on non-contract items over $5,000 ($3,000 for Grant-funded purchases)

Bid Goal
To obtain goods or services as specified by the department at the most competitive price while complying with NC Purchasing Rules, Regulations, and ECU policies and procedures.

Responsibilities
a) Requesting Department: To know the specifics of what is required to fulfill your particular need.

b) Purchasing Specialist: To oversee the process of obtaining goods and services for a department ensuring that all of the State and University policies and procedures are met as required by law.

c) Bidding Vendor: To provide the goods or services to the department as specified by the bid documentation.

The Bid Process
1) Develop specifications, denoting a detailed precise presentation, plan, or proposal for the item or services to be purchased, for use in the bid document.

2) Select a potential vendor/supplier and create a requisition that is submitted for Division approval and then send to Materials Management with all supporting documentation attached as appropriate. This will encumber the funds for your purchase.

3) Requirements and specifications provided by the department are merged with the bid document.

4) The bid document is posted on the State’s IPS site where it is advertised and made available to the public for 10 days.

5) If necessary, the potential bidders submit questions and concerns or provide feedback on the bid requirements.

6) Provide answers to any questions referred to the department by the purchasing specialist on behalf of the bidder. (Departments should not discuss this project directly with any bidder while it is in the bid process.)

7) Respond with the answers provided by the department to the potential bidder and, if necessary, issue a bid addendum.

8) Submit a bid that meets or exceeds the bid specifications prior to the date and time on the bid document. There are no exceptions to this requirement.
9) A public bid opening takes place during which the purchasing specialist will read the submitted bids. Bid tabulation is completed to include all vendors’ names and bid prices/responses.

10) After the bid opening, the purchasing specialist will retain the original copies of the bids and bidders’ names and total bid price will be posted on the State’s IPS website where it is available to the public.

11) Copies of the lowest bids are sent to the department for evaluation.

12) Reviewing of the bids are started with the lowest bidder to determine if the bids submitted have met all the specifications as outline in the bid document. Only specifications included in the bid document can be used to evaluate the bid.

13) An award recommendation is sent to the purchasing specialist by the department based on the lowest bid that meets specifications.

14) Purchasing specialist reviews the department’s recommendation.

15) Purchase order is issued using the original created requisition on which the supplier will be changed if necessary.

16) Bidder provides the goods and services.

Any questions about this process should be directed to the Department of Materials Management (252)328-6434. [http://www.ecu.edu/purchasing/](http://www.ecu.edu/purchasing/).
Instructions for Sole Source and Brand Specific Justification
(Orders over $5,000/$3,000 for Grants)

**Sole Source**
On occasion it may be necessary to purchase equipment, supplies or services from a single source vendor. When an item or service is clearly and legitimately available from only one known source of supply, this is called a Sole Source. Research is required to confirm there is only one source and documentation is needed for the file. Examples of sole source procurements include:

- Items which must be operationally compatible with existing equipment or systems and are available only from the original manufacturer.
- Items that have specific or clearly unique features essential for the completion of the task or project at hand that is available from only one source.

Preference for one vendor, product, or service does not constitute a sole source. Furthermore, obtaining a vendor’s quotation, demonstration, or acquisition and testing by a department does not constitute a sole source. These preferences must be determined through a competitive RFQ/RFP/IFB process issued by the Materials Management Department.

A completed **Sole Source and/or Brand Specific Justification form** should be submitted with your approved requisition to Materials Management for review and approval. Materials Management will send a bid document to a sole source vendor to establish firm pricing and include our Terms and Conditions.

**Note:** A detailed explanation, see section 3 of the **Sole Source and/or Brand Specific Justification** form, is required along with the Department Chair's/Department Head's original, full signature of approval.

Departments should note that budgetary considerations are not sufficient grounds to approve a sole source purchase. Remember that if your requirement is available from more than one source, it is not considered a sole source.

**Brand Specific**
At times, a certain brand of equipment or item is needed. When a single, preferred product is required, it is called Brand Specific. Examples of brand specific procurement include:

- When changing brands or manufacturers would compromise the continuity of the research project or proprietary items; e.g. copyrighted software, publications, etc.
- When a researcher’s grant specifies a certain brand of instrument or equipment (Department will be required to attach appropriate section of grant to verify this information).

Justification will include features which are unique and essential for the intended use that other manufacturers of like products do not offer.

A completed **Sole Source and/or Brand Specific Justification form** should be submitted with your approved requisition to Materials Management for review and approval. Materials Management may send a bid document to multiple vendors for a brand specific purchase with the required specifications.

**All Sole Source and/or Brand Specific purchases must be justified by the end user and approved by Materials Management.** The use of Sole Source or Brand Specific shall be limited only to those
specific instances which are totally justified to satisfy compatibility or technical performance needs.

**Forms**

*Sole Source Justification Form*

Any questions about this process should be directed to the Department of Materials Management 328-6434. [http://www.ecu.edu/purchasing/](http://www.ecu.edu/purchasing/).
University Storerooms

Materials Management operates one consolidated University storeroom made up of the following to support and facilitate campus needs.

- Central Stores & Receiving
- Medical Storeroom

Central Stores, Medical Storeroom & Receiving-East Campus

- Located 1150 South Greene Street (215C)

Counter Sales

This service is provided for maintenance personnel as well as other departments to obtain needed maintenance supplies for use on campus. The maintenance supply sales counter is located in the Central Stores facility at 1150 South Greene Street. A work order and correct accounting code is needed and required to obtain items from the maintenance supply warehouse.

Empty Toner Cartridge Pickup

Central Stores collects empty toner cartridges used throughout the University. Once a new cartridge is placed in your printer, please place the old cartridge in the same box and call 328-9941 for pick up. These empty cartridges are then returned to a supplier so they can be legally and properly remanufactured or recycled.

Furniture

Central Stores offers contract office furniture such as file cabinets, a select number of office chairs, and storage cabinets through the office supply section of Central Stores. A small quantity of these items are available on site to inspect and order. Furniture available from Central Stores is listed in the ECU Office Supply catalog in PORT. Requisitions are submitted to Central Stores via PORT and in-stock items are delivered within 48 hours. Desks, tables, chairs and bookcases are also available through special order.

- Bookcases
- Chairs
- Desk
- File Cabinets

Labor and Use Charges for Additional Services

There are occasions when we are asked to provide labor, use of forklift or delivery vehicle, or provide temporary holding. When assistance is needed outside the daily realm of the warehouse operations additional charges may be applied. These are treated on a case by case basis. When requests are made, a correct departmental account code is needed for charge purposes. Please call 328-9940 to request service or for questions. The following rates apply:

- Fork lift - $30.00 up to the first hour, $25.00 per hour thereafter
- Delivery vehicle - $25.00 up to the first hour, $20.00 per hour thereafter
- Temporary Holding - materials may be held for thirty days at no charge. Leased space rates will be applied after thirty days.
Leased Space
Central Stores offers warehouse type, non-conditioned space for departmental storage use. A per square foot monthly charge is applied to the department for the area needed. Items acceptable for storage are furniture to include desks, chairs, filing cabinets, bookcases or any other item/s that would not need a conditioned environment. Hazardous or contaminated items are not allowed. Please contact Central Stores at 328-9940 with questions concerning leased space.

- Leased space charges for non-conditioned space - $0.25 per square foot per month.

Medical Storeroom- Order Processing/Storeroom Sales
This service is provided for medical personnel as well as other departments to obtain needed medical and scientific supplies, gases, and housekeeping supplies for use in departments, clinics, labs, and classrooms. Catalogs for items stocked by the Medical Storeroom are available in PORT. Approved requisitions are submitted to the Medical Storeroom via PORT for processing and orders are delivered by Medical Storeroom personnel to Brody, East Campus and local sites.

Receiving Services/ Dock Delivery
Air express packages and other UPS, FedEx, or DHL deliveries are shipped directly to departments according to the delivery address stated on the purchase order. Bulk ground orders via common carrier or truck freight, and other deliveries are received by Central Receiving personnel during normal business hours of 8:00am-12:00pm and 1:00pm-5:00pm Monday-Friday. The receiving dock is located at our facility on 1150 South Greene Street. These deliveries are noted on daily delivery logs and are delivered within 48 hours after receipt to the address noted on the shipping label. Shipping personnel will notify departments prior to delivery to verify drop off locations. Please call Central Receiving at 328-9941 if you have questions or need assistance.

Shipping Services - East Campus
Central Stores can ship your business packages to off-campus sites. We have negotiated lower shipping rates with FedEx and UPS, which provides a cost savings to the University.

- East Campus departments who need to ship a package via FedEx or UPS should take the following steps before turning the package or shipment over to Central Stores and Receiving for processing:

- Prepare and seal the contents in the appropriate packaging. If an overnight letter or package envelope is needed, it will be provided by the shipping office. If appropriate packaging is not available please call 328-9940 for assistance. **Very Important:** If the contents of the shipment can be considered "hazardous" please take time to read the Hazardous Material Shipping Guidelines and notify our shipping department at 328-9941. If the shipment is to an international destination, (shipping out of the country) the department is required to notify the Office of Research Compliance at 328-9473 to receive approval for shipping prior to notifying Central Stores. Please notify Central Stores at 328-9940 if your package cannot be shipped via FedEx or UPS such as those shipments that require the use of LTL type shipping due to weight and size, commonly referred to as common carrier.

- “Ship to” locations are required and should be noted as follows: A “ship to” label is required to be affixed to the package/s or envelope and the “ship to” location is required on the campus requisition. Please note: Carriers will not deliver to post office boxes. Package/s or envelopes must
have the recipient's name, company name, street name or number, building name or number, city, state, country, and correct zip code. Also, it would be helpful to provide the recipient's telephone number if possible. This information is used to enter the shipping information in a web based application for processing shipments.

- A campus requisition form is needed for all outbound shipments to include department name, date of shipment, department phone number, a correct departmental charge account number, and the appropriate approval signature. The description and instructions must contain the carrier (i.e. FedEx, UPS) & level of service (i.e. overnight, second day air, ground) you wish to use, the street address of the recipient (carriers will not deliver to post office boxes), a declared value of the contents if you wish to insure the shipment, and who will be paying for the charges (i.e. bill recipient, bill sender). The requisition is also used to process monthly freight bill charges to the departments. Printed campus requisition forms can be obtained from the office supply section of Central Stores if needed.

- Please call Central Stores and Receiving at 328-9941 when your package is ready for pick up and shipment. Receiving personnel will pick up the package from your campus location. Note: To guarantee shipping on the same day, Central Stores must have the package on site by 3:30pm. This will allow time for processing the shipment and have it ready for pick-up by the shipping company by 4:00 pm. Any packages received after 3:30pm will be shipped the following day unless priority shipping arrangements are made.

**Voucher Purchases**

This service is provided for departments on east and west campus for daily purchases and pickups from local vendors for items that are not inventoried in Central Stores. Departments using this service must provide the proper account number that is to be charged, a work order number if applicable, and a list of the items that are needed. The requested items are ordered and picked up by Central Stores and delivered to the department upon request.

**Medical Storeroom – West Campus**

- The following services are still located at Brody Building, Room GE-78

**Chemical Manager Gas Cylinder Program**

The gas cylinder program was implemented in an attempt to reduce costs and paperwork associated with approximately 525 cylinders located in the Medical School complex. One consolidated invoice is generated to the University monthly and cylinders are tracked from a central location. In addition, certain cylinders are stored in quantity on site which is helpful should an "emergency" arise.

All gas cylinders for Brody and adjacent buildings are purchased through the ECU Medical Storeroom. Gas cylinder orders are received via a department generated requisition in PORT. The Medical Storeroom stocks a high use tank inventory and works with our gas vendors to coordinate Storeroom stock. When a cylinder leaves the storage area a tracking number is affixed to the tank and that number is entered into an automated tracking/monthly rental billing system (Chemical Manager). When the tank is returned to the storeroom the number is removed and entered as "returned" in the Chemical Manager system. Throughout this process, the department that is in possession of the tank is automatically billed for the monthly rental charges. Note: Cylinder rentals are billed in arrears; billing is generated at the end of each month for the previous month's charges.

As an added bonus to the cost savings, all bidding processes and State Contracts are strictly adhered to.
**PLEASE NOTE:**
Medical Storeroom personnel are responsible only for the delivery and removal of cylinders from the School of Medicine laboratories. Storeroom personnel are not authorized to make connections of piping, regulators or other apparatus. Cylinder/tank safety and the various use or attachments are the responsibility of the department using the tank.

**Important Message to Departments/Gas Cylinder Users at Brody School of Medicine:**
Tanks delivered to departments are the responsibility of the department receiving the tanks. The cost of the gas and the monthly lease are billed to the department’s FOAPAL code as stated on the requisition. Any cost incurred to the Storeroom from the gas vendor for lost or missing tanks (cylinders) will be charged to the department.

Anytime a cylinder is relocated to another room or location, please e-mail Tony Roebuck with the Medical Storeroom at roebuckt@ecu.edu. The Medical Storeroom will move tanks for departments if labs change or tanks are relocated. If assistance is required in transporting the cylinder to another location, please contact the Medical Storeroom at 744-3629. The Medical Storeroom cannot be responsible for lost or missing tanks. It is the department’s responsibility to maintain tank inventory for their respective departments.

**Shipping Services (West Campus)**
The Medical Storeroom can ship your business packages to off-campus sites. We have negotiated lower shipping rates with FedEx and UPS, which provides a cost savings to the University.

The Medical Storeroom and FedEx have implemented a TWO (2) NUMBER billing/accounting procedure to expedite the billing process. This procedure was implemented as follows:

1) The first account number will be used strictly for all packages shipped by Brody Shipping and Receiving (GE78) using the Federal Express PowerShip system. This account number will be used exclusively for all outbound packages that are being charged to an ECU departmental account using a campus requisition. This is an outbound/bill shipper account number only.

2) The second account number will be used for all other packages, including Third Party Charges, Bill Recipient or Collect Packages. This number will be available from the Medical Storeroom on request. If a department needs to have something shipped collect, bill recipient or authorizes an inbound (receiving) collect charge, the second account number will be used. The Medical Storeroom will issue this number as needed.

**Note:** Any charges received on the Federal Express invoice that we do not have a Campus Requisition for, will be automatically re-billed back to the shipping party.

Medical School employees who need to ship a package via common carrier should take the following steps before turning the parcel over to the shipping personnel in Brody Shipping and Receiving, Room GE-78.
For Packages LEAVING The Brody School of Medicine that are being PAID for on an ECU account, use the Federal Express account number or if the package is being BILLED TO another company, school or individual:

1) Prepare and seal the contents in appropriate packaging. If an overnight letter or package envelope is needed, it will be provided in the shipping office. If appropriate packaging is not available please call 744-3316 for assistance. Very Important: If the contents of the shipment can be considered "hazardous" please take time to read the Hazardous Materials Shipping Guidelines and notify our shipping department at 744-3316. If the shipment is to an international destination, (shipping out of the country) the department is required to notify the Office of Research Compliance at 328-9473 to receive approval for shipping prior to notifying the Storeroom. Please notify shipping 744-3316 if your package cannot be shipped via FedEx or UPS such as those shipments that require the use of LTL type shipping due to weight and size, commonly referred to as common carrier.

2) Fill out a campus requisition to pay the shipping charges that are incurred. The campus requisition must include the following information: Name of department, Date of the shipment, Dept phone number, Departmental address (room number), a correct departmental account number (FOAP), and the appropriate approval signature. The description must contain: the carrier (i.e. FedEx, UPS), level of service you wish to use (i.e. overnight, second day air, ground), the complete address of the recipient (remember that carriers will not deliver to post office boxes), a declared value of the contents if you wish to insure the package, and whom will be paying the shipping charges (i.e. bill recipient, bill sender).

3) Provide one shipping label. This label should be affixed to the package. Please note: SHIPPING CARRIERS WILL NOT DELIVER TO POST OFFICE BOXES. They must have: The Recipient’s Name, Company Name, Street Address, Building Name or Number, City, State, Country, and Zip Code. Also, it would be helpful to provide the recipient’s telephone number if possible (all International packages do need a contact phone number to be processed).

4) If East Carolina University or the Brody School of Medicine is not paying for the shipment, complete the appropriate carrier’s freight bill in full or on a campus requisition give the appropriate FOAPAL code to charge.

5) Deliver the package and paperwork to the shipping office (GE-78) and sign in on the outbound shipment log (this is our record of your package going out that day). *PLEASE NOTE: Shipping & Receiving should be called to pick up a package for shipment only if it is heavy or cumbersome.

6) All departments that need a hard copy of the Campus Requisition should detach the pink or gold copy prior to forwarding to Shipping and Receiving. Campus Requisitions will not be forwarded back to the department. The Campus Requisition number can be matched to the Journal Entry in Banner.

Please try to have all of your shipments in the shipping office as soon as possible, but no later than 4:00 p.m. for same day service. This allows shipping personnel entry time for packages before couriers begin to arrive.

For packages being BILLED TO a Department at The Brody School of Medicine as a Third Party, Bill Recipient or Collect Billing charged by an outside company, university, individual, etc.:

Obtain from the shipper billing your department a Contact Name, Shipping Address and Phone Number and then call the Medical Storeroom at 744-2249 or 744-2241.
1) Give the information you received from the shipping contact to the Medical Storeroom representative and the Medical Storeroom will give you the appropriate account number to use.

2) After contacting the Medical Storeroom, fill out a Campus Requisition with the same information as if you are taking the package to the Shipping and Receiving department and send it to the Medical Storeroom so your department can be billed when the charge arrives.

3) PLEASE NOTE: Any packages on a bill that the Medical Storeroom does not have a Campus Requisition for will be billed back to the shipper.

A Third Party billing is if someone outside of your department has a package delivered to another individual outside of your department and you have given them our account number to charge.

A Bill Recipient package is a package delivered to you from an outside individual that you have told our account number to and authorized them to charge it.

Important! Any shipments charged to the University that are not handled in the shipping office (i.e. drop off, collects, out of town) must still generate a campus requisition to pay for the charges incurred. Shipments will not be processed without a completed campus requisition.

Questions regarding shipping should be directed to the Shipping & Receiving office in Brody at 744-3316.

Questions regarding shipment billing should be directed to the Medical Storeroom office in Brody at 744-2249.
Surplus Property

ECU Surplus Property Office is responsible for tracking and disposing of all property purchased with University funds.

- Located at 1104 Clark Street.

Surplus Property Available for Campus Use

All ECU departments have the opportunity to view surplus property items for use back on campus. Viewing is by appointment only. Appointments are available Mondays and Tuesdays 8:30-11:30 and 1:30-4:30. Contact Surplus Property at 328-9941 for assistance.

ECU Surplus Property Cash Sales

The Surplus Property Office conducts a bi-monthly sale to allow the general public to purchase surplus items no longer needed by the University. Effective January 7, 2010, all public sales are conducted on the 1st and 3rd Thursday of each month from 8:30am – 11:30am. A public viewing is held prior to sale day on Wednesday from 1:00pm – 3:00pm. Surplus property bid pick-ups are not permitted during retail store hours of operation. Note: The intent of the surplus property cash sales is to allow the general public an opportunity to obtain items no longer needed by the University at a nominal cost. Items purchased from these sales should not be used back on campus or cost reimbursement to the purchaser from a university department. Items can be obtained for departmental use by calling 328-9941.

Guidelines for Surplus and Disposal

ECU Surplus Property Office is responsible for tracking and disposing of state property in accordance with State policies and procedures. All equipment and supplies purchased with University funds is the property of East Carolina University and the State of NC (regardless of funding source) until the appropriate approvals and disposition processes are followed.

The following guidelines apply:

- Items that are no longer needed by a department are required to be surplused via ECU Surplus Property procedures.
- Under no circumstances can State property be simply thrown away, given away, or taken home.
- These protocols are in effect regardless of the cost of the item or equipment.

Procedures for Surplusing University Property

1) Ensure that you or the appropriate person in your department has access to PETS (Property Equipment Tracking System). The registration process and access information is available on the PETS Home Page at http://www.ecu.edu/cs-admin/purchasing/surplus/PETS.cfm.

   a. Computer CPU’s, Laptops, and Servers should be entered on a separate Surplus Pickup Request from other department items and equipment due to sanitation requirements. Monitors, printers, keyboards, and mice do not require sanitizing and should be entered on the same Surplus Pickup Request with routine surplus items.
   b. If the item(s) being surplused has a Fixed Assets’ tag number, this number must be entered in the Asset # field on the Surplus Pickup Request in PETS. The full 9-digit number must be
entered (6-digit ECU tag # plus three zeros ‘000’ at the end). If the correct Fixed Assets’ tag number is entered, information from the Fixed Assets’ system such as serial number and model number will automatically populate on the Surplus Pickup Request.

c. Each item needs to be listed individually with a complete description. Items cannot be entered in “lots”. For example, if you have 5 chairs to surplus, each chair must be listed including the condition and description. If any items are damaged or are in non-working order, please denote this in the description field. A miscellaneous box of small items is acceptable; however, a quantity and description of the miscellaneous items must be entered in the description field (i.e. 2 staplers, 3 wood desk trays, 2 keyboards). The only exception is a box of cords. A description of each cord is not necessary; just enter one box of miscellaneous cords.

The Surplus Pickup Request must be approved at the department level by the PETS administrator or user that has been granted approval authority. Upon authorization, the user or administrator is verifying that all conditions as listed in the PETS system have been met. Once the Surplus Pickup Request is completed and approved, it is submitted electronically to the Surplus Property Office. The Surplus Office will review and schedule pickup for each request. Temporary pickup tags and a pickup schedule/manifest are printed by Surplus and delivered to the department by Central Stores’ personnel. A copy of the pickup schedule is printed and emailed to Moving Services.

Each Surplus Pickup Request is assigned a Disposal Request # (i.e. DR# 10274) by the PETS system. This number will be needed to complete the Moving Services request in step 4 below.

3) Once temporary pickup tags and the pickup manifest are received, the department is responsible for placing the appropriate temporary tag on the appropriate item described on the tag and the pickup manifest. These labels are white, peel and stick labels with readable bar codes. The labels must be placed in a visible area on the item such as the top of the desk, arm of the chair, etc.

The manifest will show an assigned Pickup Schedule # (i.e. Pickup Schedule #182).

4) Once all items are tagged, enter a Work Order Request to have Moving Services pick up items going to Surplus via the Facilities Services’ WEB Asset/Work Management System. When completing the Work Order Request, it is NOT necessary to list all items from the pickup manifest on the work order; however, you are required to enter the DR# on the first line of the description of the work order so that Moving Services will be able to match your request with the appropriate manifest. Instructions for completing the Moving Services’ request are available on the WEB Asset/Work Management System under the link titled Surplus Removal System/PETS and may be accessed by clicking https://wwwapps.ecu.edu/msworkrq_dotnet/PETS/surplusprocedure.htm and entering your ECU login information.

A separate Work Order Request is required by Moving Services for each Disposal Request # (you cannot put multiple DR #’s on the same Work Order).

Moving Services has requested a two week lead time in picking up your items. Special needs should be referred directly to Moving Services 328-6080.

5) With the appropriate Work Order and copy of the pickup manifest in hand, Moving Services will verify the items for pickup, verify and note the quantity, and will ask a department representative to sign off in the “Authorized by” section of the pickup manifest, which denotes the department’s approval of the items going to Surplus. Moving Services’ personnel will also sign the pickup manifest denoting they are receiving/moving the property.
NOTE: The department is responsible for the safety and security of all University equipment and supplies until Moving Services has taken possession. We do not recommend you sit items in the hallway or other unsecured areas where items may easily be removed by Faculty, Staff, Students, or visitors. Moving Services can ONLY pickup items that have been tagged with the temporary tags and included on the pickup manifest. Items not tagged CANNOT be picked up. If you have additional items that need to go to Surplus, a new Surplus Pickup Request must be entered.

6) Moving Services will deliver the items to Surplus Property. Surplus Property will accept delivery by signing the pickup manifest, will scan the bar codes, and will update inventory. When items are received by Surplus Property that reference an ECU Tag #, departmental Fixed Assets’ inventory records will be updated accordingly.
   a. Departments can view the history of items that have been surplused via the PETS system. This history may be printed at a later date should it be needed to update Fixed Asset or internal department records.

REMEMBER: Property is not considered surplus until it’s received by the Surplus Property Department. In addition, property can only be surplused via the PETS system following the steps listed above. Example: If your department purchases new computers for several staff members and an older computer is given to another staff member within the department, the computer would not be considered surplus. Ownership of the computer is still the responsibility of this department and should be tracked as such. If we are unable to confirm receipt of your equipment it will not be removed from your inventory and your department will be contacted.

Equipment (not moved within ECU or transferred to another government agency) is placed on a list and bid through State Surplus Property in Raleigh. Individuals may bid on these items. For information regarding the bid process, go to http://www.doa.state.nc.us/ssp/index.htm. Item(s) not sold via the bid process with State Surplus Property may be sold in the ECU Surplus Retail Store or are disposed in accordance with the guidelines set forth by State Surplus Property.

As stated above, departments should note any defects or damage to equipment via the description field in PETS. Information in the description field will print on the temporary tag and will therefore be visible to Surplus staff.

Biohazard/Contaminated Property
Before lab or clinical items can be surplused, Environmental Health and Safety (East Campus) or Prospective Health (West Campus) is required to inspect the items for contaminants and approve removal from the lab or clinic prior to being surplused. An item is considered contaminated if it has come in contact with patients, body fluids or blood, hazardous chemicals, etc. Departments, labs, and clinics are responsible for notifying the appropriate safety department for their particular location. If lab or clinic related surplus items have not been verified or approved by the appropriate safety department, Moving Services cannot accept your items or process your move requests. Moving Services has been instructed to NOT pick up these items unless they are identified and cleared by EH & S or Prospective Health.

Procedure for Surplusing Computer CPU's, Laptops, Servers, or Hard Drives
All computer CPU’s, laptops, servers, and hard drives must be sanitized to protect sensitive information. The ITCS Department is responsible for the sanitation of these items. Visit http://www.ecu.edu/itcs/policies/diskclean.cfm for a copy of the policy. It is the responsibility of ECU Surplus Property to ensure that no computers are disposed of by means of sealed bid, retail sales, or
transferred to other organizations without a sticker confirming the computer has been sanitized by the ITCS department.

The Surplus Property Office in conjunction with ITCS has developed a process to ensure these items are disposed appropriately. When departments decide to surplus a computer CPU, laptop, or server, the following steps should be taken:

1) Ensure that you or the appropriate person in your department has access to PETS (Property Equipment Tracking System). The registration process and access information is available on the PETS Home Page at [http://www.ecu.edu/cs-admin/purchasing/surplus/PETS.cfm](http://www.ecu.edu/cs-admin/purchasing/surplus/PETS.cfm).

   a. Pickup Request from other department items and equipment due to sanitation requirements. Monitors, printers, keyboards, and mice do not require sanitizing and should be entered on the same Surplus Pickup Request with routine surplus items.
   b. If the item(s) being surplused has a Fixed Assets’ tag number, this number must be entered in the Asset # field on the Surplus Pickup Request in PETS. The full 9-digit number must be entered (6-digit ECU tag # plus three zeros ‘000’ at the end). If the correct Fixed Assets’ tag number is entered, information from the Fixed Assets’ system such as serial number and model number will automatically populate on the Surplus Pickup Request. **The manufacturer, serial number, and model number are required to be listed for all CPU’s, laptops, and servers. If the unit does not have a Fixed Assets’ tag number, this information should be keyed in manually when the Surplus Pickup Request is entered.**
   c. Each item needs to be listed individually with a complete description. Items cannot be entered in “lots”. For example, if you have 5 computers to surplus, each computer must be listed including the condition, description, serial number, and model number. If any items are damaged or are in non-working order, please note this in the description field.

The Surplus Pickup Request must be approved at the department level by the PETS administrator or user that has been granted approval authority. Upon authorization, the user or administrator is verifying that all conditions as listed in the PETS system have been met. Once the Surplus Pickup Request is completed and approved, it is submitted electronically to the Surplus Property Office. The Surplus Office will review and schedule pickup for each request. Temporary pickup tags and a pickup schedule/manifest are printed by Surplus and delivered to the department by Central Stores’ personnel. A copy of the pickup schedule is printed and emailed to Moving Services.

Each Surplus Pickup Request is assigned a Disposal Request # (i.e. DR# 10274) by the PETS system. This number will be needed to complete the Moving Services request in step 4 below.

3) Once temporary pickup tags and the pickup manifest are received, the department is responsible for placing the appropriate temporary tag on the appropriate item described on the tag and the pickup manifest. These labels are white, peel and stick labels with readable bar codes. The labels must be placed in a visible area on the item such as the top of the CPU, etc.

The manifest will show an assigned Pickup Schedule # (i.e. Pickup Schedule #182).

4) Once all items are tagged, enter a Work Order Request to have Moving Services pick up items going to Surplus via the Facilities Services’ WEB Asset/Work Management System. When completing the Work Order Request, it is NOT necessary to list all items from the pickup manifest on the work order;
however, you are required to enter the DR# on the first line of the description of the work order so that Moving Services will be able to match your request with the appropriate manifest. Instructions for completing the Moving Services’ request are available on the WEB Asset/Work Management System under the link titled Surplus Removal System/PETS and may be accessed by clicking https://wwwapps.ecu.edu/msworkrq_dotnet/PETS/surplusprocedure.htm and entering your ECU login information.

A separate Work Order Request is required by Moving Services for each Disposal Request # (you cannot put multiple DR #’s on the same Work Order).

Moving Services has requested a two week lead time in picking up your items. Special needs should be referred directly to Moving Services at 328-6080.

5) With the appropriate Work Order and copy of the pickup manifest in hand, Moving Services will verify the items for pickup, verify and note the quantity, and will ask a department representative to sign off in the “Authorized by” section of the pickup manifest, which denotes the department’s approval of the items going to Surplus. Moving Services’ personnel will also sign the pickup manifest denoting they are receiving/moving the property.
   a. Moving Services can ONLY pickup items that have been tagged with the temporary tags and included on the pickup manifest. Items not tagged CANNOT be picked up. If you have additional items that need to go to Surplus, a new Surplus Pickup Request must be entered.

NOTE: The department is responsible for the safety and security of all University equipment and supplies until Moving Services has taken possession. We do not recommend you sit items in the hallway or other unsecured areas where items may easily be removed by Faculty, Staff, Students, or visitors.

6) Moving Services will deliver the CPU’s, laptops, and servers to the ITCS sanitizing area, which is located at the Surplus Property facility. Surplus Property will accept delivery by signing the pickup manifest, but the items will not be received for surplus until sanitation is complete.
   a. Departments can view the history of items that have been surplused via the PETS system. This history may be printed at a later date should it be needed to update Fixed Asset or internal department records.

There is no need to notify ITCS prior to completing the surplus of computers if parts or components are missing. Please note this information in the description field of the Surplus Pickup Request in PETS. Please do not set computers and other electronic components in hallways or other areas where others can obtain easily. The computers will be removed from the departmental inventory once the units have arrived at the sanitizing area. Departments are held accountable until this process is complete. Please call 328-9941 if you have questions about the computer surplus process.

Frequently Surplused Items
Filing Cabinets & Desks:
   Needs to be empty; do not leave file folders, paper, or supplies in drawers
   Needs to be unlocked; tape key to top of cabinet or desk

Surplusing Vehicles
The following steps should be taken to surplus an ECU departmental vehicle:
1) Notify Automotive Services at 328-6427 and ECU Surplus Property at 328-9941 to start the process for surplusing vehicles

2) Return all GAS CARD(s) to the Gas Card Manager at the Steam Plant (if applicable)
3) Return all FIRE EXTINGUISHER(s) to the Steam Plant
4) Remove any ECU property from vehicle
5) Bring all LICENSE PLATE(s), KEYS, and any MILEAGE logs to the Fixed Assets Office
6) Complete the University Vehicle Transaction Form and send it to Risk Management, ECU Campus Operations, 1001 E. Fourth Street. Click here to access the University Vehicle Transaction Form.

PLEASE NOTE: You will be responsible for insurance coverage until tags are removed and Risk Management requirements are satisfied. Contact Risk Management for more information at 328-2010.
NC Federal Surplus Property Agency Program

What exactly is the NC Federal Surplus Property Program?

Federal Surplus Property is part of the Division of Surplus Property and was created for the specific purpose of serving as a procurement and distribution organization for surplus federal property. The property is donated by the federal government and recipients pay a service charge for the property. This property is only available to qualifying agencies such as tax-supported public agencies, volunteer fire departments or rescue squads, nonprofits, tax-exempt educational or public health institutions, etc. Federal surplus property is not available to the general public.

Some of the items available through Federal Surplus include clothing/textiles, food preparation and service equipment, furniture, vehicles, and heavy equipment. A detailed listing of Federal Surplus is available on the NC Federal Surplus Property website at http://www.doa.nc.gov/fsp/. This site also provides information about the program such as eligibility requirements and photographs of surplus property.

IMPORTANT: All communications for federal surplus purchases should begin initially through the ECU Surplus Property Office. For additional information, instructions/procedures, and to request a letter of request for purchases call 328-9931.

Please note that there are specific limitations in the use and retention of Federal Surplus Property. Please read the Do You Know? section of the Federal Surplus Property Agreement carefully.

Obtaining Surplus Property from Other State Agencies

Sometimes an ECU department may like to obtain surplus property from another State agency to use on campus. The State Surplus Property Office has procedures in place to accommodate the transfer of state owned property. Some transfers are offered at no cost, while other transfers may have cost applied. To view items available from State Surplus in Raleigh, visit www.doa.nc.gov/ssp/gen-priority.htm.

Departments interested in purchasing State surplus items should contact Fixed Assets at 328-9931 for guidance and assistance.
Fixed Assets

- Located at 1104 Clark Street.

What is Fixed Assets Responsible For?

Fixed Assets, a unit within the Department of Materials Management, is tasked with maintaining accurate records, reporting, performing annual inventory, and tracking of University equipment from the time it is purchased until it is disposed of in accordance with State rules and regulations.

The purpose of tracking fixed assets is for financial accounting, preventive maintenance, and internal control including theft deterrence.

Fixed Assets Threshold:

- Equipment with a purchase (or donation/gift) cost of $5,000 or more and useful life of 2 or more years. Any newly purchased equipment that was tagged by the Fixed Assets Office and sent back to the supplier for warranty purposes will need to be re-tagged. Please contact the Fixed Assets Office at 328-9941.
- PC’s and Laptops with a purchase cost of $2,500 or more.

When equipment is purchased new Fixed Assets will email the department to determine what department will be assigned ownership of the equipment. It’s not uncommon for a department to use their funds to purchase equipment for another department. This process will be utilized when transferring equipment from one department to another as well.

It is recommended that departments have an internal tracking procedure for equipment under the aforementioned dollar thresholds for accountability purposes. A suggested Inventory Tracking form can be found under forms on the Fixed Assets Home Page. University property not recorded in the Fixed Assets System should be tracked at the departmental level.

Grants:

- Equipment purchases with Federal dollars cannot be sold or transferred without approval by the Grants & Contracts Office.
- Grant equipment is tagged and tracked in the Fixed Assets system. This equipment is not capitalized as university property unless the detail of the grant gives the university ownership. This information is obtained from the Grant’s office once the piece of equipment is paid for. If this equipment will be the property of the university, it is capitalized at this time even if the grant is not closed.
- Equipment requesting to be transferred with a PI must be approved by the Office of Grants & Contracts. If the grant has closed the property can be sold at fair market value to the transferring PI. A request to purchase by negotiated sales will be submitted to State Surplus Property for approval by the Fixed Assets Office. This process takes approximately 2 weeks.
- PI’s transferring equipment from another Agency must complete an Inventory Control Form. This form identifies the equipment(s) being transferred to the university. Fixed Assets will tag the equipment with an ECU grant property tag according to the equipment value.
**Equipment Status Changes:**

**Moving Equipment - within ECU**

Equipment may be moved from one ECU department to another or may relocate equipment within their department after the appropriate paperwork is filed. The following steps should be taken to ensure ownership and locations are updated in the Fixed Assets’ System appropriately:

1) Enter a Work Order Request to have Moving Services pick up items to be moved via the Facilities Services' WEB Asset/Work Management System. When completing the Work Order Request, each item for pickup should be listed in detail in the “Work Requested” area including where the items are to be picked up and where they are to be delivered. The quantity and ECU tag number should be listed along with the item description. Once the Work Order Request is submitted, the requester should maintain a copy of the moving request and request number. Facilities Services will batch and send the original copies of moving requests to the Fixed Assets Office on a weekly basis.

2) After a Work Order Request number is obtained, complete an Equipment / Furniture Relocation Request Form to be submitted to Moving Services. Make sure when completing this form that the ECU tag number, new room number and building numbers are included. Without the ECU tag number included on the Equipment / Furniture Relocation Request, the equipment information will not be updated in the Fixed Assets system. Therefore the changes will not be seen on your departmental inventory report.

These steps will insure the location of equipment in the Fixed Assets' System is changed appropriately and accurately. Also, departments should keep a copy of the EFRF form and work order for their inventory records. Keep in mind, no equipment can be transferred or given to another State Agency (or anyone else) without authorization.

**Transferring Ownership - within ECU**

Occasionally a department may have an item that is tagged by Fixed Assets that they would like to simply transfer ownership of or responsibility for the item to another department. The item may be small enough to carry from one department to another or the location of the item may not need to be changed at all, only the owner is being updated. In this case, a Moving Services work order request or the EFRF form is not needed.

If at least one physical inventory cycle has been completed, this item should be on the department's inventory tracking list. Ownership can only be changed if it is agreed upon by both departments. The department transferring ownership in conjunction with the department accepting ownership should complete a Fixed Assets Transfer Form. This form must be attached to the department’s annual inventory report and submitted to Fixed Assets for updates to be made in the Fixed Assets’ System.

**Note:** It is highly recommended that departments use the Fixed Assets Transfer Form to transfer, track, and account for items that are not tagged by Fixed Assets, but are on a department’s internal inventory list. This can be helpful when an ECU department has a chair, for instance, that they are going to allow another ECU department to have. Internal inventory lists should be updated annually and are subject to audit.
Surplus of Equipment and Other Departmental Items

All equipment and supplies purchased with University funds is the property of East Carolina University and the State of NC (regardless of funding source) until the appropriate approvals and disposition processes are followed. Under no circumstances should State property be simply thrown away, given away, traded in, or taken home. Fixed Assets and the Surplus Property Department are responsible for the disposition or transfer of all surplus property in accordance with State policies and procedures. Departments that have excess property or items that are no longer of use must surplus those items. Items can only be surplused via the ECU Property Equipment Tracking System (PETS). The following steps should be followed:

1) Ensure that you or the appropriate person in your department has access to PETS (Property Equipment Tracking System). The registration process and access information is available on the PETS Home Page at http://www.ecu.edu/cs-admin/purchasing/surplus/PETS.cfm.

   a. Computer CPU’s, Laptops, and Servers should be entered on a separate Surplus Pickup Request from other department items and equipment due to sanitation requirements. Monitors, printers, keyboards, and mice do not require sanitizing and should be entered on the same Surplus Pickup Request with routine surplus items.
   b. If the item(s) being surplused has a Fixed Assets’ tag number, this number must be entered in the Asset # field on the Surplus Pickup Request in PETS. The full 9-digit number must be entered (6-digit ECU tag # plus three zeros ‘000’ at the end). If the correct Fixed Assets’ tag number is entered, information from the Fixed Assets’ system such as serial number and model number will automatically populate on the Surplus Pickup Request.
   c. Each item needs to be listed individually with a complete description. Items cannot be entered in “lots”. For example, if you have 5 chairs to surplus, each chair must be listed including the condition and description. If any items are damaged or are in non-working order, please denote this in the description field. A miscellaneous box of small items is acceptable; however, a quantity and description of the miscellaneous items must be entered in the description field (i.e. 2 staplers, 3 wood desk trays, 2 keyboards). The only exception is a box of cords. A description of each cord is not necessary; just enter one box of miscellaneous cords.

The Surplus Pickup Request must be approved at the department level by the PETS administrator or user that has been granted approval authority. Upon authorization, the user or administrator is verifying that all conditions as listed in the PETS system have been met. Once the Surplus Pickup Request is completed and approved, it is submitted electronically to the Surplus Property Office. The Surplus Office will review and schedule pickup for each request. Temporary pickup tags and a pickup schedule/manifest are printed by Surplus and delivered to the department by Central Stores’ personnel. A copy of the pickup schedule is printed and emailed to Moving Services.

Each Surplus Pickup Request is assigned a Disposal Request # (i.e. DR# 10274) by the PETS system. This number will be needed to complete the Moving Services request in step 4 below.

3) Once temporary pickup tags and the pickup manifest are received, the department is responsible for placing the appropriate temporary tag on the appropriate item described on the tag and the pickup manifest. These labels are white, peel and stick labels with readable bar codes. The labels must be placed in a visible area on the item such as the top of the desk, arm of the chair, etc.
The manifest will show an assigned Pickup Schedule # (i.e. Pickup Schedule #182).

4) Once all items are tagged, enter a Work Order Request to have Moving Services pick up items going to Surplus via the Facilities Services’ WEB Asset/Work Management System. When completing the Work Order Request, it is NOT necessary to list all items from the pickup manifest on the work order; however, you are required to enter the DR# on the first line of the description of the work order so that Moving Services will be able to match your request with the appropriate manifest. Instructions for completing the Moving Services’ request are available on the WEB Asset/Work Management System under the link titled Surplus Removal System/PETS and may be accessed by clicking https://wwwapps.ecu.edu/msworkrq_dotnet/PETS/surplusprocedure.htm and entering your ECU login information.

A separate Work Order Request is required by Moving Services for each Disposal Request # (you cannot put multiple DR #’s on the same Work Order).

Moving Services has requested a two week lead time in picking up your items. Special needs should be referred directly to Moving Service at 328-6080.

5) With the appropriate Work Order and copy of the pickup manifest in hand, Moving Services will verify the items for pickup, verify and note the quantity, and will ask a department representative to sign off in the “Authorized by” section of the pickup manifest, which denotes the department’s approval of the items going to Surplus. Moving Services’ personnel will also sign the pickup manifest denoting they are receiving/moving the property.
   a. Moving Services can ONLY pickup items that have been tagged with the temporary tags and included on the pickup manifest. Items not tagged CANNOT be picked up. If you have additional items that need to go to Surplus, a new Surplus Pickup Request must be entered.

**NOTE:** The department is responsible for the safety and security of all University equipment and supplies until Moving Services has taken possession. We do not recommend you sit items in the hallway or other unsecured areas where items may easily be removed by Faculty, Staff, Students, or visitors.

6) Moving Services will deliver the items to Surplus Property. Surplus Property will accept delivery by signing the pickup manifest, will scan the bar codes, and will update inventory. When items are received by Surplus Property that reference an ECU Tag #, departmental Fixed Assets’ inventory records will be updated accordingly.
   a. Departments can view the history of items that have been surplused via the PETS system. This history may be printed at a later date should it be needed to update Fixed Asset or internal department records.

**REMEMBER:** Property is not considered surplus until it’s received by the Surplus Property Department. In addition, property can only be surplused via the PETS system following the steps listed above. Example: If your department purchases new computers for several staff members and an older computer is given to another staff member within the department, the computer would not be considered surplus. Ownership of the computer is still the responsibility of this department and should be tracked as such. If we are unable to confirm receipt of your equipment it will not be removed from your inventory and your department will be contacted.

Equipment (not moved within ECU or transferred to another government agency) is placed on a list and bid through State Surplus Property in Raleigh. Individuals may bid on these items. For information
regarding the bid process, go to http://www.doa.state.nc.us/ssp/index.htm. Item(s) not sold via the bid process with State Surplus Property may be sold in the ECU Surplus Retail Store or are dispositioned in accordance with the guidelines set forth by State Surplus Property.

**Obtaining Surplus Property for Campus Use**

University departments are offered the use of equipment which has been turned into the Surplus Property Warehouse. There is no charge for this equipment. Departments should contact the ECU Surplus Property Department at 328-9941 and arrange a time to inspect surplus items for possible use by a department. The Surplus Property Department does not pick out or put property on hold for departments. If the equipment was tagged with an ECU tag number previously, this equipment will be re-assigned back on campus to your department inventory for future tracking. It is not recommended that departmental personnel use their personal vehicle to pick-up property that is taken back on campus for departmental use. We recommend you utilize Moving Services for transporting University property whenever possible.

Departments interested in surplus property items should visit the warehouse and inspect the material to ensure suitability. Since the material is on a “first-come first–served basis”, the item selected will be tagged for the department and held for 10 business days. The department is responsible for submitting a Moving Services work order request for the item(s) to be delivered to their department. The department is responsible for contacting the Surplus Property Office to extend the 10 day deadline.

**Lost Equipment**

Management is responsible for implementing procedures for maintaining control over and the safeguarding of assets. Equipment is considered lost when a department reported having equipment on the prior year physical inventory verification report, but can no longer locate the equipment. If there is no documentation for the equipment being surplused or stolen, the equipment is considered lost. The equipment will be placed on the Lost Inventory Report Listing for two years. It is requested that each department with lost inventory confirm their listing annually. The department at that time will have a chance to change the status of the equipment if the item(s) has been located.

Lost inventory reports are subject to audit. The department should make every effort to locate the equipment or the proper paperwork documenting the disposition of the equipment prior to marking an item as lost. Any item marked as lost inventory requires a brief, reasonable explanation by the department as to why the equipment cannot be found.

**Stolen Equipment**

If equipment is stolen, the proper authorities (ECU Police, PCMH Security) are to be notified so that a police/security report can be completed. ECU Police and PCMH Security forward copies of police/security reports involving University owned equipment to the University Attorney’s Office. An SBI report is generated and forwarded to the University Internal Auditors and to the Fixed Assets Office for updating the University Inventory System. The employee discovering the theft must report the theft to his/her supervisor. State guidelines require the supervisor notify the head of the department immediately.

If ECU property is stolen while off campus, the appropriate Police Department should be notified and a police report filed. The University Attorney’s Office, Fixed Assets Office, the employee’s supervisor, and Department Head should also be notified of the situation. This should take place for all University property regardless of cost.
**Cannibalized Equipment**
If equipment becomes irreparable, but certain parts or components can be used to maintain other similar pieces of equipment the irreparable item can be cannibalized. A *Cannibalization Form* must be completed and forwarded to the Fixed Assets Office. We will need to be informed of which property the cannibalized equipment will be used to support.

Please note that computers cannot be cannibalized.

**Equipment - Taken Off Campus**
Permission for removal of University-owned property may be granted only for University business and not for personal use. Any time faculty or staff members take University-owned property off campus a *Going Off-site Equipment Tracking Form* should be completed with the appropriate Department Head’s signature granting permission for this property to be moved to an off-campus location. This Form indicates the period of time the property is to be off campus, a justification, ECU tag number if appropriate, and the description of the specific items involved. If this property is to be off campus for over a week, this form must be sent to the Fixed Assets Office for tracking.

Departments that are taking a list of equipment off-campus for use in field projects, may attach a list to the *Going Off-site Equipment Tracking Form* and state “Per Attached”.

The same process can be utilized for equipment (example: laptop computer) checked out to faculty on an annual bases using the Annual Off-Campus Equipment Tracking Form.

Note: Departmental Heads are responsible for reporting any misuse of State property to the State Bureau of Investigation according to GS_114-15.1 and GS14-91 for Embezzlement. In addition, if the Department Chair is requesting to take State Property off campus, the next in authority would sign the Equipment Tracking Form granting permission.

**Export Controls**
In the event your department needs to send equipment outside of the United States, please contact the Office of Research Compliance and Administration (ORCA) for review and approval.

[http://www.ecu.edu/cs-acad/rgs/export.cfm](http://www.ecu.edu/cs-acad/rgs/export.cfm)

**Equipment Traded-In**
When equipment is requested to be traded-in, a requisition should be transmitted to Materials Management via PORT for the new equipment along with a description of the item(s) that are being traded-in. In addition, a *Property Trade-In Form* must be completed and submitted to the Fixed Assets Office. The trade-in must be approved by State Surplus Property. Fixed Assets will communicate with a purchasing specialist in Materials Management to confirm that approval has been granted and appropriate documentation has been obtained for the trade-in. Fixed Assets’ processing time is approximately one week. The purchase order cannot be processed until the approval is obtained.

*Note:* This property cannot be removed from the University campus until prior approval is received from State Surplus Property and Materials Management issues a purchase order.
Equipment Transfer / Negotiated Sales - Outside ECU

Transfer of state-owned equipment within the State:
The transfer of any state-owned equipment to another North Carolina state-supported institution or agency requires prior approval from the State Surplus Property Office. The user requesting approval to transfer equipment should contact the Fixed Assets Office. Fixed Assets will request the appropriate State approval. State institutions or agencies shall not transfer any personal property owned by the State without written authorization by State Surplus Property. Property being transferred is sold at fair market value to the State Agency. Under no circumstances can state-owned equipment be donated, traded-in, or given to another entity without approval of the State Surplus Property Office. State owned equipment cannot be transferred out of the country. Transferring equipment out of the State is in violation of State guidelines.

Transfer of state-owned equipment outside the University System:
State-owned equipment cannot be transferred to an institution outside the University of North Carolina system without prior approval from the State of N.C. Department of Administration. To obtain such approval, a detailed letter of justification must be submitted to the Fixed Assets Office. This letter must be supported by approvals from the department head, the dean, the Grants Office and the Office of Sponsored Programs (if the equipment was originally purchased in whole or in part with Contract or Grant funds). Except for equipment originally purchased with Federal funds, reimbursement will be required from the receiving institution or organization at fair market value. Please allow 30 to 60 days for processing of out-of-state transfers. If the equipment is supported by a grant, please review Grants and Contracts guidelines at http://www.ecu.edu/cs-acad/grants/upload/POLEquipmentPurchases.pdf or call 328-9530

NOTE: It is recommended that a physical inventory of capitalized assets and inventoried items be taken each time there is a change at a management or supervisory level that has responsibility for the assets. The out-going and in-coming supervisor/manager should sign the physical inventory reports. The signatures indicate they both know where the assets are located and that the count is accurate. It is kept on file in accordance with internal policies.

Donations / Gifts
REMEMBER: All gift(s) to the University must be recorded in the Office of Gift Records at the Greenville Center. Please contact them at 328-9571.

Forward the following information to the Fixed Assets Office along with a completed Inventory Control Form:
- If donor will have title completed we will need the following:
  - Title made to East Carolina University
  - Letter of donation
- Equipment - The Inventory Control Form will provide Fixed Assets with the needed information to initiate the tagging process.

Obsolete, Unserviceable and Unnecessary Equipment
It is recommended that all equipment not being utilized should be cannibalized or sent to surplus. State guidelines require that all equipment active in the Fixed Assets’ system be depreciated each year. Depreciation is the allocation of the total acquisition cost of a capital asset over the entire life of the equipment. Therefore, each department is required to report the estimated number of year(s) the
equipment will continue to be used to the Fixed Assets’ Office annually. Equipment surplus will be posted by State Surplus Property for other agencies that may have a need for the asset.

Replacement of Defective Equipment Under Warranty
If an equipment item(s) assigned an ECU tag# becomes defective while under warranty and the item is replaced by the vendor/manufacturer, the Fixed Assets’ Office will need to be notified. Send an email to Deidra Williams at williamsdei@ecu.edu. Provide the following information for the equipment that was replaced: ECU tag #, item description, and the serial number. Provide a copy of the packing slip for the replacement part with the description and serial number. Fixed Assets will provide the new/replacement equipment with another ECU tag # and remove the old equipment from your departmental inventory listing. If you have question please contact Fixed Assets at 328-9941.

Vehicles, Boats, Trailers, Modular (trailers)...
License plates and registration for university-owned vehicles, boats, trailers, etc. (not Motor Fleet) are obtained through the Fixed Assets’ Office. Fixed Assets will notify the ECU Automotive Shop supervisor after obtaining the plates and registration by email to initiate processing of the gas card, garage records, key duplicating, and insurance. Also, Fixed Assets maintains the monthly-updated University-Owned Vehicles List.

The following information is needed to obtain license plates and registration: COA (certificate of origin), Sales Invoice, Title Application, PO#, and FOAP code. The PO# and FOAP information is needed to request a check from the Accounts Payable department. Once all paperwork is in place the process will take approximately 2 weeks. For more information contact Fixed Assets at 328-9931.

Fixed Assets Reference Information

Annual Equipment Inventory
Departmental Lost and Physical Inventory Verification reports are posted in E-print in October of each year. Departmental Inventory Control staff will need Fixed Assets Inquiry access in Banner to pull the two reports. Fixed Assets requests that Physical and Lost Inventories be verified at the same time. Both reports are due back to the Fixed Assets’ Office by the end of November. All updates must be made in writing directly on the printed report(s) according to the Physical Inventory Verification Guidelines. Departmental Inventory Report(s) will not be considered certified without the department head’s signature. Building codes may be found on the Fixed Assets’ homepage.

Departmental Inventory Control staff needs to review the Physical Inventory Verification Guidelines to ensure inventory reports are completed accurately.

- When equipment has already been assigned to a department and we have at least one physical inventory cycle completed by the department, ownership can only be changed if it's agreed upon between the two departments. To transfer ownership, a Fixed Assets Transfer Form should be completed and signed by both departments, and a copy attached to the department’s inventory report.
- Any equipment that cannot be located by a department will be moved to the department’s lost inventory report if no documentation is provided (No Exceptions). Equipment will remain on the lost inventory report for 2 years.
- Departments will need to provide an explanation of why equipment cannot be located or provide proof of the disposition of the equipment. The following are examples of acceptable documented
proof: a copy of the work order, packing slip on equipment returned or replaced, copy of police report for stolen property, etc.

- Each year Fixed Assets will need an estimated number of years equipment will be used before replacement. This information is crucial in order for the University to remain in compliance with State guidelines.
- Computers cannot be cannibalized.

Please note that the University Business Manual states that the administrative head is responsible for the custody and proper care of capital equipment within his/her unit. A **Going Off-site Equipment Tracking Form** should be completed for all university equipment being taken off campus and forwarded to the Fixed Assets’ Office if equipment will be off campus for more than 7 days. It’s the department’s responsibility to update this information annually. Also, note that each unit’s inventory is subject to audit by State and Internal Audit at any given time. Forms needed to maintain accurate records to keep our department apprised of any equipment changes can be found on the Fixed Assets’ Home Page. Please utilize these forms to support the accurate tracking of University equipment.

**Departmental Internal Inventory Tracking Guidelines**

Each Department Head is responsible for safeguarding all assets purchased by his or her department regardless of cost or funding source. This includes the tracking and security of all goods under a department’s control.

ECU Fixed Assets Office is responsible for tracking, tagging, and reporting on capitalized assets. A capitalized asset is equipment costing $5,000 or more and has a useful life of two (2) or more years. ECU also tags and tracks computers costing $2,500 or greater. Fixed Assets’ staff conducts a physical inventory of capitalized items annually.

Departments need to account for items, supplies, and equipment that are not tracked in the Fixed Asset’s system. These are items that fall below the Fixed Asset’s threshold. It is recommended that Inventory Control Clerks for each department adopt use of an asset tracking spreadsheet such as the **Inventory Tracking (less than $5,000)** provided on the Fixed Assets Home Page. The listing shall include a description of the item, date purchased, location/responsible person, and cost.

Materials Management does not advise departments to track supply items that are used up quickly. Expendable supplies include items such as pens, pencils, toner, paper, staples, etc.; however, the University does expect reasonable safeguarding of these types of items and actions should be taken to avoid misuse of any University resource.

Tangible items should be tracked internally by each department. This includes equipment and portable electronic devices. Examples include, but are not limited to the following:

- Equipment: “Equipment” is defined as an asset that is not consumable or expendable; it is movable, even though sometimes it is attached to other objects or buildings. Equipment may fall into one of these categories:
  - Furniture - desks, cabinets, chairs, tables, and bookcases
  - Office - calculators, fax machines, telephones, and shredders
  - Electronic Data Processing (EDP) - computers, printers, and scanners
  - Educational - scientific, medical, laboratory and classroom, as well as recording studio and audiovisual
  - Other - athletic equipment, lawn mowers, etc.
Portable Electronic Devices: Portable Electronic Devices include personal digital assistants (e.g., Palm Pilots, etc.); voice recorders; laptop computers; digital cameras; projectors and other items especially susceptible to theft.

Fixed Assets recommends that departments review and update their internal inventory tracking logs annually when Fixed Assets disseminates inventory verification checklists.

Reminders:

- Do not use capital Account codes if the item does not meet the capitalization threshold
- Equipment that has been taken off-campus must be accounted for and should be verified annually; a Going off-site (Off campus sign-out form) or Equipment Tracking (Annual form) should be on file and maintained at all times
- Internal inventory is subject to audit
- Internal inventory spreadsheets are not to be submitted to Fixed Assets
- Department Heads are responsible for ensuring University resources such as voice recorders, and laptops are returned upon an employee’s separation from the University

Spot Inspections

Fixed Assets performs spot inspections of departmental equipment annually. The results of all spot inspections are forwarded to the Office of Internal Audit for their records. Any areas of concern will be followed up with additional review by the internal auditors during their annual checks. All information will be communicated to the Division Heads.

Request for Insurance

To have equipment insured or to receive additional information regarding insurance, please contact Risk Management at 328-2010.

Forms

- Equipment /Furniture Relocation Request Form
- Fixed Assets Transfer Form
- Going Off-Site Form (Off Campus sign out form)
- Cannibalization Form
- Inventory Control Form
- Property Trade-In Form
- Equipment Tracking Annual Form
- Inventory Tracking (less than $5,000)

Additional References

- ECU Capital Assets Guidelines
- Fixed Assets PowerPoint
- Fixed Assets Building Code Listing
- Equipment Account Codes Listing for New Purchases
- Fixed Assets Inquiry and Inventory Reports Lookup
American Express Corporate Card Policies and Procedures

About the American Express Corporate Card

Please contact Materials Management at 328-6434 if you have questions or need additional information regarding the American Express Corporate Card Program.
Wright Express Gas Card Program

About the Wright Express Gas Card Program

The Department of Materials Management administers and maintains a commercial gasoline credit card program for the purchase of gasoline, diesel, or other designated motor fuels and oil. Wright Express Financial Services Corporation is ECU's authorized gas card provider.

The ECU Wright Express gas credit card is for official use only for use with state-owned vehicles including Motor Fleet and other University-owned vehicles. This card is not to be used for personal vehicles even if the traveler is on official ECU business.

Commercial credit cards are not to be used when the necessary services are available from State or University-operated facilities. Gasoline and oil should be obtained from the University service pumps whenever possible. The Wright Express gas card is an alternative when the ECU gas pumps are inaccessible, low on fuel, or in cases of campus emergencies. The Wright Express gas cards can be used for fuel and fluids only and are recognized and accepted at most major gas stations.

When purchasing fuel and/or fluids on your Wright Express gas card you should obtain a priced, itemized receipt at the time of purchase. Accounts Payable will forward a copy of the monthly statement and Banner ID Charge to departments that have purchased fuel. Departments are responsible for matching the receipts to the statement and for verifying their charges.

To obtain a Wright Express gas card, please send an email to Elaine Garris at garrisd@ecu.edu with the following information:

1. Department Name
2. FOAPAL/Budget code
3. License plate number of vehicle or vehicles that the card will be utilized with
4. Contact person name and phone number

If your card is lost or stolen, please report it immediately to Wright Express at 1-800-492-0669 and Materials Management at 328-6434. Any charges made to the card are the responsibility of the department until Wright Express has been notified.

Any questions about this process should be directed to the Department of Materials Management 328-6434. [http://www.ecu.edu/purchasing/](http://www.ecu.edu/purchasing/).
Quick Links

Common Vendor Names

Guidelines on Use of Discretionary Funds

NC Purchase and Contract

NC IT Contracts

Tax Exemption Certificate

NC Debarred Vendors
Appendix A

**UNC-G Approved Click-Wrap Agreements**
Updates

This manual was updated in December 2015. Changes included updating the following: “Authorization to Purchase Gift Cards, Prizes, and Incentives” form, Wilco-Hess gas card information, contact information for Accounts Payable, bid process information for Grant-funded orders, consolidation of the University Storerooms, the Amex Corporate Card and Banner Direct Payment form information and approved expenditures list.

This manual was updated on May 7, 2015 to add “How to Purchase Unmanned Aerial Vehicles, Drones and Quadcopters”.

This manual was updated on April 7, 2015 to add contact information for the “Vendor Coordinator” on pg. 5 and to amend the language in “Receiving of Goods” on pg. 7.

This manual was updated on January 14, 2015. There are no significant changes included in this update. Changes included fixing typographical errors and updating names (due to personnel/position changes, etc.).