

## **Process for Software Purchases and Renewals using Business Procurement Card (BPC)**

The process for the purchase of new software and renewals is being modified from the current process on the Procurement Website in cases where a check, ACH or wire payment cannot be made. Departments no longer need to come to Procurement for use of the Procurement credit card on these transactions. An individual in the department shall use their BPCard.

Departments shall utilize their BPC for these purchases in cases where the vendor will not accept a check, ACH, or wire payment. When all approvals have been completed, the BPC limit of \$1,000.00 can be waived for these purchases.

**All software renewals and purchases must be processed in UCMarket regardless of the payment method.**

**NOTE: All departments must follow UCM Procurement requirements for purchase of new software. This includes issuance of bids or RFPs for new software if the total cost including software and support/maintenance is over \$25,000.00. Do not get demos or quotes for software in advance of performing an RFP for new software. This causes problems with the RFP. An RFP allows for all vendors to equally present their written information and a demo of their product.**

1. Requisition Issuance Process:
  - a. Request a quote from vendor for product/service and EULA/SLA.
  - b. Vendor will be entered as **"BPC Vendor"**
  - c. Attach the quote/screenshot which includes cost and any reference to terms in internal notes section.
  - d. Attach EULA/SLA if one is provided.
  - e. IN THE INTERNAL NOTES SECTION: Include a point of contact for the vendor (name and email address). If signatures are required, include the vendor signature authority (name and email address).
  - f. Also, add to internal notes: **"CONFIRMATION ONLY PO"**
  - g. Use account codes: 733050 for Software RENEWAL, 750936 for NEW Software  
NOTE: DO NOT USE ANY OTHER CODE NUMBERS
2. Requisition will go through the following level approvals:
  - a. Level 1 department/grants etc.
  - b. Level 2/3/4 depending on amount (unless otherwise approved, the threshold limit for a BPC purchase is \$1000)
  - c. OT approval - review for requirements of resources, network, etc.
    - i. If RENEWAL, it is a quick review.
    - ii. If NEW - review by impacted areas with possible questions sent to requisitioner/department
  - d. If NEW, legal review to be completed with redlines being approved by vendor and UCM. Procurement will work with vendor and Legal for this review and approval process.
  - e. Procurement purchase review
    - i. Purchase review INCLUDING legal review
3. PO created – **WILL NOT BE SENT TO VENDOR**
4. Procurement shall email the user that they may proceed with this particular BPC purchase by contacting the Accounts Payable Assistant Manager or Manager.
5. User shall notify the Accounts Payable Assistant Manager or Manager to allow this type of transaction on the user's BPC. This is required as most cards are restricted from making these purchases.
6. Once approval is provided, departmental user makes the purchase on their BPC.

7. Users will process purchase receipts in Chrome River
  - a. Include the BPC PO and the quote that was attached in requisition documents.
8. PO will be closed by AP when BPC Chrome River report is completed.

#### **ADDITIONAL INFORMATION**

1. If the BPC is being used for new or renewal software, there is no need for a Vendor Information Form and W9 to be submitted by the Vendor.
2. This revised process is being utilized to make the process more efficient. It is very important that it is followed step by step. Failure to follow these steps for the purchase of new or renewal software may result in removal of the card from the person and/or department according to the BPC Manual.
3. All software technology purchases (**including "free" software, and subscriptions**) will utilize this process which will begin with the requisition.
4. Any questions associated with technology for software purchases should be addressed with the Office of Technology.
5. Any questions associated with the use of the BPC for these types of purchases should be addressed with the Accounts Payable Assistant Manager or Manager.
6. Any questions associated with procurement or the issuance of a requisition in UCMarket for these types of purchases should be addressed with the Procurement department.