



East Carolina University

Department of Materials Management

Guide to Materials Management & Purchasing

East Carolina University

Materials Management

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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 Storeroom, and the Surplus Property Office. Do not hesitate to give us a call when you need assistance.

Important Telephone Numbers

Accounts Payable	737-5442
Central Motor Pool	737-4437
Fixed Assets	328-9931
Grants and Contracts	328-9530
ITCS	328-9000
Materials Management-Purchasing	328-6434
Office of Research Integrity and Compliance (ORIC)	328-9473
Payment Cards (PCI)/eCommerce	737-5441
Surplus Property	328-9941
Supplier Management	737-5325
Travel Office	737-5700
University Printing & Graphics	737-1301
Central Stores & Receiving	328-9941
FedEx/UPS & Gas Cylinder Programs	328-9941

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 <https://ncadmin.nc.gov/about-doa/divisions/purchase-contract>.

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/Foundation 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.

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.

Conflicts from Related Parties

In order to avoid potential "conflict of interest," the University's policy is that if a University employee has an immediate family member (spouse/partner, 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 a 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 for a department to purchase materials or services from a University employee's immediate family member or their company, a request should be submitted in writing to the Director of Materials Management explaining the nature of the need and the business justification for not seeking services from other suppliers and will be sent to the Office of Research Integrity and Compliance (ORIC) for their review and approval. If approved, ORIC will develop a work plan to manage the "conflict of interest."

Conflicts from Employees

University policy prohibits purchases from University employees or companies in which any University employee has any ownership stake.

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 the [PORT Training Manual](#).

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 several 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 complete 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 <https://financialservices.ecu.edu/procard/> 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, providing a cost savings to the University.

Requisitions are transmitted via the PORT (Purchase Order & Requisition Tracking) system to Materials Management for the request of goods and services. Requisitions require departmental and divisional approval in accord with established workflow. Pending the nature of the request, Grants and ITCS 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 \$25,000.00 and less (\$25,000 or less for Grant-funded requisitions) or on State Term Contract. If the total order is over \$25,000.00 (\$25,000 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* sections of this guide or [PORT Training Manual](#) for guidelines.

Note: A vendor quotation 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 are available via Cornerstone Employee Training on ECU PiratePort. Additional information and procedures for entering a requisition are available in the PORT Manual at [PORT Training Manual](#).

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 \(Independent Contractors\)](#) section of the guide.

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, the 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 <https://financialservices.ecu.edu/ecommerce/>.

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 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 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 \$25,000.00 or less can normally be issued within 24 hours after receipt of approved requisition by Materials Management. Orders \$25,000.01 to \$500,000.00 are subject to informal 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.

All Materials Management approved emergency purchases must have a purchase requisition entered in PORT by the following business day so a purchase order can be sent to the vendor.

Supplier/Vendor Setup

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

- Log into PiratePort
- Under Tools, Under Purchasing, Select PORT – Purchasing Request
- Follow the Instruction on the Home Screen regarding a new Banner ID/Supplier ID request process
- If you have verified the ID does not exist in Banner or PORT, you will need to initiate a new vendor request
- Under Suppliers, Requests, Select Request New Supplier

For full instructions, please see [TSM-Instructions to Request a Supplier Number](#)

For more information regarding vendor setup requests, please visit [Supplier Management](#) or contact them at 737-5325 or ecu-suppliermgmt@ecu.edu.

ECU Logos

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 Communications](#) 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 <https://hipaa.ecu.edu/>.

For more information on BAAs and to define PHI, please contact BSOM Compliance office at <https://hipaa.ecu.edu/> or 744-5200.

Purchases less than \$25,000

Are the items on State Contract?

- If items are not on State Contract, departments can purchase from any vendor that has not been debarred.
• [Debarred Vendors](#)

NO

- When items are on State Contract, we are bound by State law to purchase from a State Contract vendor
• [State Term Contracts](#)

YES

Approved Purchasing Methods

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

- Preferred purchasing method for allowable purchases under \$5,000
- 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 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](#)

Purchases greater than \$25,000

Are the items on State Contract?

NO

YES

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, 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](#)

PORT Requisition

- 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
- [PORT Homepage](#)

Bid Process

- Purchasing Specialist from Materials Management will work with department to create specifications for items or service
- \$25,000.1 - \$500,000 informal bid
- \$500,000 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:

[Statewide Term Contracts | NC DOA](#)

[Statewide IT Contracts | NCDIT](#)

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

Dollar Value ¹	Rule	Method
\$01-\$25,000 Small Dollar Purchases (\$01-\$25,000 for Grant Purchases)	1. State Term Contracts if applicable, if the item is not on State contract, choose one of the following: 2. University Storeroom (PORT) 3. University convenience contracts (PORT) 4. Any non-barred vendor	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 cardholder’s single transaction limit.
\$25,000.01- \$500,000 Informal Bids	1. State Term Contracts if applicable; if the item is not on State contract an informal bid process will be required.	A requisition must be entered into PORT.
> \$500,000 Formal Bids	1. State Term Contracts if applicable are mandatory; if the item is not on State contract a formal bid process will be required.	A requisition must be entered into PORT.
Over \$500,000 P & C Bids	1. State Term Contracts as these are typically mandatory, if the item is not on State contract a formal bid process by State Purchase & Contract will be required	A requisition must be entered into PORT.

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 \$25,000 small purchase threshold, and thereby avoid the rules requiring the applicable method for competition.

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. Please do not order furniture from these office supplies vendors since they are not on the furniture state term contract.

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.

Printing

The purchasing procedures for printing are the same as other commodities/services. For print jobs exceeding \$25,000, 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 <https://upg.ecu.edu/copiserv/> for more information.

Historically Underutilized Business

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,

http://www.ncdoi.com/OSFM/Engineering_and_Codes/Documents/Code_Enforcement_Resources/ElectricalMechanicalEquipmentLabeling.pdf

Water, Beverages, and Pepsi Products

Beverages (water, juice, sports drinks, and other Pepsi products) are procured from Minges Bottling Group which has exclusive pouring rights on ECU's campus and all efforts need to be made to ensure that the University honors this contract.

Aquafina (Pepsi) water is available through our Central Stores in 16.9 oz. bottles in the 24-count case (item # 240-12312) 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 Pepsi 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. <https://purchasing.ecu.edu/>

Used Equipment

All used equipment purchases must be approved in advance by Materials Management. Any used equipment purchase request must include the model number, condition, and age of the equipment being requested and detail what makes the purchase of the used piece of equipment a better overall value than purchasing new (including cost and warranty). If the item is available on State Contract, departments must also submit a comparison showing the contract price vs the used equipment price. With the purchase of a used item comes a risk that the item will not work as intended and most used items do not come with a warranty or guarantee of working condition. As such, the department must state in writing if they are willing to accept the risk of purchasing a used item.

If purchasing from an online auction site (i.e. eBay) using the ECU ProCard, the payment will need to go through PayPal using an ECU email address, mailing address, etc. and the item must be purchased from a vendor, not an individual. ProCard holders must put their approval email with their statement to show the purchase of used equipment was approved in advance.

All used equipment purchases are also subject to funding source approval and have a ECU business purpose documented.

Any questions about this process or purchasing should be directed to the Department of Materials Management (252)328-6434. <https://purchasing.ecu.edu/>

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. <https://purchasing.ecu.edu/>

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 earning more than \$5,000, a Personal Contract Services agreement must be initiated PRIOR to beginning work.*** Departments should begin the process by:

- 1) Go to the [Personal Contract Services](#) homepage for more information.
- 2) Obtain a Banner ID, if the independent contractor does not already have one.
- 3) Read through the instructions and start the process by submitting a request in PORT for a Personal Services Contract. Complete the questions that are asked. Once the request is submitted it will be routed for approvals, and then to Materials Management for a new contract to be created.

Payment

Once a Personal Services Contract is executed, Materials Management will 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 \$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 to pay non-ECU employees or students.

Instructions for Completing the Contractual Services Payment Request Form (form updated March 2022)

Section 1: 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, or a current ECU student.

Section 2: 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 PiratePort/Submit Vendor Request and following the instructions.

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. Select if the contractor is a US Citizen, Permanent Resident, or Non-resident alien. Please note that the black dot can change to other selections by clicking on the other bubbles.

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 if the recipient has an immediate family member working at ECU. If they do, list the family member's name and the ECU department they work in. Please note that the black dot can change to other selections by clicking on the other bubble.

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 end date. Payment will not be made until the end date has passed. ECU does not pay contractors in advance of the work being performed.

Section 9: 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 10: Types of Services Rendered

Provide a detailed description of the services rendered by the recipient.

Section 11: Reason for Selecting This Individual to Perform These Services

Indicate why this recipient was chosen to perform these services.

Section 12: Basis of Fee

Enter the daily rate times the number of days to be paid and the total of all services being paid.

*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 13: 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.

Account Numbers	Description
73001	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.
73038	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.
73011	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.
73062	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.
73064*	Honorariums: This minor object includes the payments to professional persons for services rendered when custom or propriety forbids the setting of fees. <i>*This account code may not be used on grant funds.</i>
73101	Academic Inst/Res Service: This minor object includes non-payroll payments for instructional and research services performed by individuals who are not State employees.
73067	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.

Section 14: 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 15: 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" . Provide the typed name of the person completing the form if different than the person contracting the services.

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: 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. This should be the last signature you obtain before the form is sent to Accounts Payable for payment.

Section 19: Grants Administration

Provide the signature by Grants Administration (if applicable). This signature certifies that the services and budget were authorized and approved. This signature is only applicable if a Grants FOAP is used.

Section 20: Foundations

Provide the signature by Foundations (if applicable). This signature certifies that the services and budget were authorized and approved. This signature is only applicable if a Foundations FOAP is used.

Signatures may be obtained by DocuSign but that is not required. If DocuSign is used, make certain Materials Management is the last signature requested. Also "carbon copy" Accounts Payable at accountspayable@ecu.edu. That insures that the form goes directly to Accounts Payable for timely payment.

Any questions about this process should be directed to the Department of Materials Management (252)328-6434 <https://purchasing.ecu.edu/>

How to Buy Goods- Audio Visual, Classroom and Information Technology Equipment and Services

Computer, Desktop, Laptop and Peripheral Purchases

All computer purchases are placed through PORT. No check vouchers, personal reimbursements, or ProCard purchases allowed. Basic purchasing policies and procedures apply. All purchases of desktops, laptops and tablets are required to be selected from ECU Standardized CPI Configurations. The PORT e-procurement system must be used for all computer, laptop and tablet purchases. Computers noted as the ECU Standards are purchased through the PORT Punch-Out Catalogs, are configured with the ECU image and ready to access the Network. ECU Standard Windows Desktops and Laptops/Computers can be purchased through the Dell and Lenovo PORT Punch-Out Catalogs. Apple Desktops and Laptops ARE NOT eligible for the CPI Program but are available and need to be purchased through the Apple PORT Punch-Out Catalog and all Apple MacBooks, Minis, and iPads need to come with AppleCare to be properly enrolled for the University AppleCare Manager and easily supported by ITCS and Apple. All ECU non-standard computers (HP Computer and including Microsoft Surface 2-in-1's) must be purchased using the Technology Request Form in PORT and will follow the following process:

<https://ecu.teamdynamix.com/TDClient/1409/Portal/Requests/ServiceDet?ID=31689>. For further information regarding this please don't hesitate to reach out to Materials Management and/or ITCS prior to making your purchase.

Materials Management IT Buyer: 328-6434

Info Technology Manager • AFH IT Client Engagement and Support at 328-9866.

[Statewide IT Contracts | NCDIT](#)

All associated peripheral purchases and accessories for the computer, desktop, laptop and tablet devices should also be purchased with the corresponding vendor.

Combined Pricing Initiative (CPI)

On July 1, 2010, new purchasing procedures were implemented by the UNC System Office for PC desktop and laptop computers. These new procedures are a required mandate of all 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 Info Technology Manager • AFH IT Client Engagement and Support at 328-9866. with questions you may have regarding the program.

Current CPI Vendors: Dell • Lenovo • Hewlett Packard (HP) • Microsoft Surface

- DELL Desktop/Laptop and LENOVO Desktop Computers are recommended as the CAMPUS STANDARD.
- ALL Non-Standard and HP Computer as well as Microsoft Surface Purchases must be submitted through PORT using the **TECHNOLOGY REQUEST FORM** with an attached quote detailing the configuration of the computer system. For all HP Computer it is recommended that they be purchased through Applied Data Technologies as they are associated with the STC 204A. For the Microsoft Surface device it is recommended that they be purchased through either CDW-G or SHI International Corporation as they are both associated with the STC 204A.

- Dell Products are available through the Dell PORT Punch-Out Catalog found on the PORT Homepage under Computer Supplies. To obtain a quote for Dell and/or Lenovo please don't hesitate to contact Info Technology Manager • AFH IT Client Engagement and Support at 328-9866.
- Apple Products and Tablets are currently not included in the CPI program.

Adobe Suite Product Purchases

All Adobe Suite Product Purchases should be purchased through the ECU ITCS Catalog Software within PORT.

[Software | Information Technology and Computing Services | ECU](#)

No sensitive data can be stored in Adobe Creative Cloud

Software Purchases

All request for software, regardless of total dollar value and funding source, needs to be submitted on the appropriate Technology Request Form. Basic purchasing processes and procedures apply to all software purchases. Purchases under \$5,000 may be made with a ProCard (*ProCard policies & procedures apply*) provided that the ProCard Technology Request Form is approved PRIOR to the software purchase. Research should be conducted to see if any of the items are on contract prior to purchasing. **All software purchases are subject to the ITCS review and approval processes.**

[Service - Technology Purchase Process \(teamdynamix.com\)](http://teamdynamix.com)

[If you have questions on whether your purchase needs the Technology Request Form please consult Materials Management and/or ITCS or use the TNF Answer Guide which can be found on the PORT Homepage Bulletin Board.](#)

[TNF Answer Guide.xlsx \(ecu.edu\)](#)

In response to the necessity to assess software purchases from both a technical and Americans with Disabilities Act (ADA) perspective, ITCS and Materials Management have established a procedure to facilitate an easier, trackable, and compliant process. All software (hosted/non-hosted, boxed, downloaded, etc.) will need to be assessed and approved for purchase by ITCS before your order can be placed. The technology purchase forms are now located in PORT.

Two forms are available, ProCard Technology Form and Technology Request Form (via Requisition), with use dictated by your preferred purchasing method. These forms can be found on the PORT Homepage under Forms. If utilizing the ProCard to purchase technology – please remember that you are to get a ProCard Technology Request Form approval prior to purchasing.

Any user with Shopper access will be able to submit the ProCard Technology (via ProCard) Form for software purchases. Users with Requisitioner or Division Approver access will be able to submit, both the ProCard Technology (via ProCard) and Technology Request (via Requisition) Forms.

Any software purchased will be required to be submitted on either one of the forms – however there are a few exemptions and those can be found within the Technology Request Exemption List.

[Microsoft Word - Technology Request Exemption List \(ecu.edu\)](#)

If you have any further questions and/or concerns regarding this process please don't hesitate to contact Materials Management at 328-6434 or email us purchasing@ecu.edu.

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).**

No Department and/or End User should sign any SLA, MSA, EULA or Contractually Binding Agreements without first consulting with Materials Management.

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 at 328-9866 to review the guidelines affiliated with these purchase types. Hosted Software will also go through a process of executing the ECU MOU prior to approving the purchase and/or signing any associated SLA, MSA, EULA or Contractually Binding Agreements.

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 Technology Request Form in PORT for ITCS to review and approve. Please be sure to attach the quote as well as any and all applicable agreements, justifications and other supporting documents necessary for the purchase.
- Materials Management will review the justification, license agreement and maintenance agreement for the software/services.
- 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](#)
- 204N - [Apple Computer Equipment, Peripherals & Services](#)
- 204X - [IT Infrastructure Solutions](#)
- 208H - [Microsoft Select Agreement](#) (Microsoft Products other than what is offered free through ITCS)

IT Contract Vendors in Port: Govconnection • CDWG • Dell • Apple • 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 Materials Management - IT Buyer for assistance as needed for obtaining quotes, contract information as well as pricing information for these related suppliers.

Internet Domains

Requests and information regarding domains can be directed to ITCS Infrastructure at 328-9008 (or Via TeamDynamix).

Personal Communication Devices (I.E. Cellular Phones and Pager Services)

Departments are required to order cell phones, pagers, mobile hot spots, and data plans through the ITCS. Any questions about this process should be directed to ITCS 737-5200.

[Cellular and Pager Services Requests](#)

Cloud Computing and Online Instructional Tools

Please see <https://itcs.ecu.edu> for guidance and policies regarding the purchase these types of services.

Any questions about this process should be directed to ITCS at 328-9866.

Electronic & IT Accessibility (ADA Compliance)

The University has an established process that applies to software and/or hardware purchased to ensure they are accessible with regard to assistive technology and are able to produce accessible products and content. East Carolina University uses the 508 Standards - Software Applications and Operating Systems. To meet the standards, a product must either build in accessibility features as part of the development, or be compatible with assistive technology. These standards provide proven techniques for the design and development of universally accessible software, hardware, and operating systems. The specifications address keyboard access, screen focus, tabbing order, compatibility with assistive technology, visual cues for audio alerts, field and control labeling, documentation, color coding, adjustment of screen colors, and access to menus.

Some technology purchases may qualify for an [Exemption or an Exception](#). Exceptions require an Alternative Access Plan (except for the Back-Office exception) and approval from the University ADA Coordinator.

Please see [Department Computer Purchase](#) for more information.

Any questions about this process should be directed to ITCS at 328-9866.

Audio Visual and Classroom Technology Equipment

All Audio Visual and Classroom Technology Equipment purchases/requests should all be vetted and approved with the support of both Materials Management as well as the Audio-Visual Support Team. The Audio Design and Engineering team provides consultation services for audiovisual systems and

equipment updates in classrooms, conference/seminar rooms and all other spaces throughout both East and West Campus. By taking advantage of this team's expertise, any new systems and equipment will be reliable and supported as well as utilizing the established contract for AV/Classroom Technology. East Carolina University has an established AV/Classroom Technology Equipment Contract with 8 suppliers that can be utilized as well as a State Term Contract. Should your Department need assistance in any Audio Visual and Classroom Technology Equipment project/purchase please don't hesitate to reach out to AV Design Team or Materials Management. This equipment is also subject to the same purchasing processes as well as the Technology Request Form review and approval processes prior to any purchase and/or work being approved. No Department and/or End User should sign and/or agree (verbally or in writing) to any contract, order form or project without first consulting Materials Management.

[Service - Audiovisual Consultation \(teamdynamix.com\)](https://www.teamdynamix.com)

[Service - Audiovisual Support \(teamdynamix.com\)](https://www.teamdynamix.com)

[Article - Classroom Configurations \(teamdynamix.com\)](https://www.teamdynamix.com)

How to Buy Unmanned Aircraft Systems, Drones and Quadcopters

The interest in the use and procurement of Unmanned Aircraft 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.

Purchase, construction, and use of any unmanned aircraft system at East Carolina University or by any agent representing East Carolina University requires prior review by the Unmanned Aircraft Systems Advisory Committee (UASAC).

[ECU Unmanned Aircraft Systems \(UAS\) Regulation | Research | ECU](#)

Regulatory Requirements

The Unmanned Aircraft Systems Advisory Committee (UASAC) was created to ensure the University and its constituents, including faculty, staff, and students as well as members of the community of the Pirate Nation, remain safe and their privacy is protected when on ECU campuses and when attending ECU functions. The UASAC also strives to ensure that researchers and educators wanting to utilize UAS can do so by following all laws, regulations, and policies required by the Federal Aviation Association, North Carolina laws, and ECU.

ECU Requirements and Procedures

All purchases of unmanned aircraft systems must be approved by the UASAC **PRIOR TO** using or procuring the unmanned aircraft system.

Departments who have been approved to purchase an unmanned aircraft system need to attach their approval to their purchase request. Any request to purchase an unmanned aircraft system without approval from the UASAC will be returned to the department.

Approval from the UASAC is **only** the approval to proceed forward with the procurement process. All procurements greater than \$25,000 may be required to go through the process as described in “Purchasing greater than \$25,000” section of Guide to Materials Management.

Any questions about this process should be directed to the Unmanned Aircraft Systems Advisory Committee (UASAC). UAS@ecu.edu

Car Rentals

****The ECU Visa ProCard is the preferred method for payment of rental charges****

All staff and faculty must be approved for travel prior to renting a vehicle.

Effective October 1, 2017, ECU Central Motor Pool will no longer be using state vehicles for daily/weekly/monthly rentals through ECU Parking. These rental reservations will now be made utilizing the North Carolina Department of Administration's State Term Contract 975B, please go to: <https://parking.ecu.edu/enterprise-rentals/>; or contact by e-mail: Parking and Traffic

PARKING@ecu.edu ; or by phone: 328-6294. They have an instructional PowerPoint available on the new rental car process.

Out-of-State Travel

The North Carolina Department of Administration's State Term Contract 975B also authorizes ECU employees to utilize 975B when traveling on University business out-of-state. The ECU Visa ProCard is the preferred method of payment of rental charges. All ECU Travel Policies/Procedures still apply. No insurance or extra fees are allowed. For more information, please see the [ECU Travel Procedures Manual](#).

For information regarding reimbursement of rental car charges, refer to the [Travel Office page](#) or contact the [Travel Office](#).

Purchasing Automated External Defibrillators (AEDs)

Purpose

The Office of Environmental Health & Safety (EH&S) provides oversight to the AED (Automated External Defibrillators) program on campus in consultation with the AED medical advisor (Prospective Health Physician). The University has taken a risk-based approach to identify AED locations on campus, focusing on areas considered to present a higher-than-normal risk for occupants to suffer cardiac arrest (athletic and exercise facilities, clinics and patient care areas, large assembly venues, etc.). ECU Police are also equipped with AEDs in their patrol cars as they serve as first responders.

Guidelines

AEDs require a physician's prescription and must be registered with the County EMS Office. Also, the AEDs must be properly tested and maintained, personnel must receive CPR/AED training and there must be written protocols for operation, maintenance and recordkeeping.

Departments wishing to purchase an AED must receive authorization from EH&S/Prospective Health **PRIOR** to purchasing the AED. The approval from EH&S/Prospective Health must be attached with your ProCard documentation or in PORT with the requisition. All other purchasing rules and regulations apply (i.e. subject to competition if purchase is over \$25,000).

For more information regarding AEDs, please contact the [Office of Environmental Health & Safety](#)

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 to include Electronic **gift cards**, also known as eGift **cards**, digital **gift cards**, mobile **gift cards** and virtual **gift cards**, all refer to **gift codes** (see, they're not even **cards**) that are delivered using technology such as email, SMS text, social media, and smartphone apps.

[Are you paying a research participant?](#)

<https://financialservices.ecu.edu/wp-content/pv-uploads/sites/86/2018/05/Greenphire-flow-chart.pdf>

(follow this link to the flow chart on the Financial Services Greenphire website)

Greenphire

Implemented September 1, 2020, [Greenphire](#) is a system that tracks payments to research study participants. This system includes a reloadable debit card that replaces gift cards and cash distributions.

Participants are required to log payments into the Greenphire research participant payment system or into the Online Participant Incentive Log, depending on the amount and frequency of payments. Greenphire may be used for incentive payments of any amount but must be used for new studies issuing payments greater than \$25 per person in a calendar year, unless an exemption is approved. Departments should maintain an internal log for each study as well as the Greenphire Online Participant Log: <https://purchasing.ecu.edu/wp-content/pv-uploads/sites/260/2018/03/Gift-Card-and-Prize-Distribution-Logs-2.xlsx>

For additional information and questions, please email Participant_Payments@ecu.edu, call 252-737-5907 or visit the website, <https://financialservices.ecu.edu/greenphire/>.

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.
<https://helpx.adobe.com/acrobat/using/fill-and-sign.html> (open hyperlink for instructions for using Adobe Reader to fill and sign documents)
<https://ecu.teamdynamix.com/TDClient/1409/Portal/Requests/ServiceDet?ID=30537>
DocuSign is an electronic signature service provided to the departments free of charge.
- 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.
- University-purchased gift cards are not approved for purchases of goods for the University. Purchasing services are not an approved use of gift cards for distribution.
- At no time may the Principal 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 or is approved by the sponsor & OCG, 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 always maintained current. The log is subject to random audit at any time.
- Distribution logs deemed confidential should be maintained in accordance with the Office of Research Administration procedures. There may also be times where the research participant should remain anonymous, even on these logs (possibly due to study protocol). In those cases, the study should work with the Division of Research and Grants to 'deidentify' these individuals.

Human Subjects/Research Participants

- The Division of Research, Economic Development and Engagement and Office of Research Administration Policy and Procedures regarding research participant payments or incentives apply.
- UMCRI 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 to allow for proper inclusion of 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
- Prize or Award (gift card)
 - a. Typically involves a selection process or a competition (i.e. contests, performance or other)
 - b. Complete and receive approval of Authorization for the Purchase of Gift cards/Gift certificates, Incentives, or Prizes Form on Materials Management websites prior to gift card purchase regardless of the value of the gift card.
 - c. Payment and Reporting process
 - i. Complete Department’s Prize Form which requires student’s signature acknowledging receipt of gift card regardless of amount.
 - ii. Follow Instructions and complete External Payments, [20-21 Additional Aid and Other Resources Form \(PDF\)](#) form of the value of gift card will be reported as a resource in Financial Aid.
- Prize or Award (tangible item)
 - a. Typically involves a selection process or a competition (i.e. contests, performance or other)
 - b. Complete and receive approval of Authorization for the Purchase of Gift cards/Gift certificates, Incentives, or Prizes Form on Materials Management website prior to tangible item purchase regardless of the value of the tangible item.
 - c. Payment and Reporting process
 - i. Complete Department’s Prize Form which requires student’s signature acknowledging receipt of tangible item
 - ii. Follow Instructions and complete External Payments, [20-21 Additional Aid and Other Resources Form \(PDF\)](#) form as item will be reported as a resource in Financial Aid.
- 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 an Administration and Finance Business Officer, currently 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 to allow for proper inclusion in tax reporting in the proper Calendar year.

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

Fund Type	Department	Contact
Grant-21xxxx	Grants and Contracts	GRANTSC@ecu.edu
State-1111xx, 112xxx (West)	Health Sciences Admin	Joel Stocks
State-1111xx (East)	Materials Management	Malinda Riles
Student Affairs-31xxx	Student Affairs	Executive Director of Business Administration Student Affairs
Special Funds-12xxx, 14xxxx	Institutional Trust Funds	ITF-SPECIALFUNDS@ecu.edu
Foundation-Exxxxx	Foundations	ecufoundation@ecu.edu
Alumni Association-Axxxxx	Foundations	ecufoundation@ecu.edu
Medical & Health Sciences -Mxxxxxx	Foundations	ECUMHSFACCOUNTING@ecu.edu

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.).

If applicable, Materials Management will send a copy of the [Authorization for the Purchases of Gift Cards/Gift Certificates, Incentives, or Prizes](#) to the Grant’s Office, and to an Administration and Finance Accountant, for University tracking purposes.

Documentation

Departments and Principal 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 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](#)

[Gift Card and Prize Distribution Logs](#)

[Consent to Collect, Use and Disclose Social Security Numbers](#) (payments \$100.00 or more)

Any questions about this process should be directed to the Department of Materials Management (252)328-6434. <https://purchasing.ecu.edu/>

Understanding the Bid Process

Purpose

The following information is provided 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 \$25,000 (\$25,000 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. <https://purchasing.ecu.edu/>

Instructions for Sole Source and Brand Specific Justification (Orders over \$25,000/\$25,000 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. <https://purchasing.ecu.edu/>

Central Stores and Receiving

Materials Management operates a Central Stores and Receiving Department that is made up of the following to include support and facilitate campus needs.

- Shipping & Receiving
- Surplus Property
- Located at 220 Industrial Boulevard

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.

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 220 Industrial Boulevard. These deliveries are noted on daily delivery logs and are delivered within 48 hours once department is notified of receipt to verify drop off locations to the address noted on the shipping label. 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 328-9941 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 328-9941 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.

Gas Cylinder Orders and Related Medical or Specialty Gas Services

Departments needing gas cylinders for medical or specialty type gas will order through Airgas USA. Each department will place their gas orders with Airgas, using an ECU pro card, through the Airgas website at <https://www.airgas.com/login>. Each department will need to set up a new account in order to log in to the Airgas website. To set up a new Airgas account, please contact the local Airgas store at csgreenville@airgas.com. Please also use this Airgas email address to inquire about billing or delivery questions. Once a department places an order, Airgas will deliver the gas to Central Stores and Receiving, and then Central Stores and Receiving will complete delivery to the department. Central Stores and Receiving will pick up the empty gas cylinders upon delivery of the new gas cylinders and return the empty gas cylinders to Airgas.

Central Stores and Receiving personnel are responsible only for the delivery and removal of gas cylinders from the laboratories in the Brody Building. Central Stores and Receiving 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. If a gas cylinder needs to be relocated to another room or location within the Brody Building, please email Central Stores and Receiving or call at 328-9941. Central Stores and Receiving will not be responsible for lost or missing tanks. It is the department’s responsibility to maintain tank inventory for their respective departments.

Liquid nitrogen are ordered by departments in PORT. Tanks can be ordered using part numbers 38100 (160 Liter) and 38105 (180 Liter). Tank orders involve the delivery of the tank by Central Stores and Receiving personnel to the department with no further service provided. Central Stores and Receiving will drop off the tank to the department and the department will then disperse the liquid. Liquid nitrogen dewar refills can be ordered in PORT using part number 38120. The refill service involves the department ordering what they estimate it will take to fill their dewar, in liters. The department's order will remain a requisition until Central Stores and Receiving personnel completes the re-fill. Central Stores and Receiving will then, if necessary, edit the requisition, complete the requisition, and charge the department's FOAP account used in the PORT order the final amount to be charged.

Shipping Services (West Campus)

Central Stores and Receiving 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.

Central Stores and Receiving 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 Shipping Manager 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. 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. Central Stores and Receiving 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.

Central Stores and Receiving 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 or 328-9941 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 or 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 and Receiving. Please notify Central Store and Receiving at 744-3316 or 328-9941 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 (Brody 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 3:30 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 Central Stores and Receiving at 744-2249 or 328-9941.

- 1) Give the information you received from the shipping contact to the Central Stores and Receiving representative and Central Stores and Receiving will give you the appropriate account number to use.
- 2) After contacting the CS&R, 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 CS&R 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 or 328-9941.

Questions regarding shipment billing should be directed to the Central Stores and Receiving office at 744-2249 or 328-9941.

Surplus Property

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

- Located at 220 Industrial Boulevard.

Surplus Property Available for Campus Use

All ECU departments can view surplus property items for use back on campus. Appointments are required to view available items Monday - Friday 8:15-11:45am and 1:15-3:00pm. Contact Surplus Property at 328-9941 for assistance.

ECU Surplus Property Cash Sales

The Surplus Property Office conducts a monthly cash sale (except for July) to allow the general public to purchase surplus items no longer needed by the University. All public sales are conducted on the 1st Thursday of each month from 8:30am – 11:00am. 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 surplus 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 are available on the PETS Home Page at <https://purchasing.ecu.edu/pets/>.
- 2) Enter a Surplus Pickup Request in PETS. Complete step-by-step procedures for entering a Surplus Pickup Request are available on the PETS Home Page under PETS Training Procedures at <https://purchasing.ecu.edu/pets/>.
 - 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. Temporary pickup tags and a manifest are printed by Surplus and delivered to the department by Central Stores and Receiving personnel.

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.
- 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' AIM/Work Management System <https://assetworks.ecu.edu/cr/UserLoginValidation.xhtml>. 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 AIM/Work Management System under the link titled AIM and may be accessed at <https://campusoperations.ecu.edu/facilities/aim/>.

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 later, 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 Office. 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 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 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.

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 Eppes 3 (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

Complete the University Vehicle Transaction Form and send it to Risk Management, ECU Campus Operations, 1001 E. Fourth Street. Access the University Vehicle Transaction Form at

<https://financialservices.ecu.edu/fixed-assets>.

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 Central Stores and Receiving at 328-9931 for guidance and assistance.

Wright Express Gas Card Program

About the Wright Express (WEX) 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. <https://purchasing.ecu.edu/>

Quick Links

[Guidelines on Use of Discretionary Funds](#)

[NC Purchase and Contract](#)

[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.).

This manual was updated in September 2016. Changes included adding a section on IT purchases for cloud computing, adding “How to Purchase AEDs”, fixing language on “How to Purchase Personal Services”, removing American Express Corporate Card section, and updating names and fixing errors.

This manual was updated in February 2017. Changes included adding ADA compliance, updating payment methods, unmanned aircraft systems (UAS) & software purchases, updating links and fixing errors.

This manual was updated in April 2017. Changes included updating the Supplier/Vendor Request process, emergency purchase process.

This manual was updated in November 2017. Changes include adding Used Equipment section as well as updating the Enterprise Rental Cars, University Storeroom, Fixed Assets and Surplus Property sections and updating links.

This manual was updated in January 2018. Changes include updated links for Export Controls and logo for cover page.

Updates in October 2018 include refreshed links to WordPress, removal of Common Vendor Names, Removal of Computer surplus instructions.

Updates in September 2019 to ECS fixed asset form and details.

Updates in October 2019 include ITCS Cloud Computing and Responsibilities link under Hosted Software.

Updates in January 2020 include ITCS link corrections.

Updates in April 2020 include Rental Cars and PORT Training Manual.

Updates in May 2021 include Gift Card and Prize Distribution Log, Telecommunications – Cellular Service and Pager Services, Equipment Change in Status Form and Travel Page links.

Updates in June 2021 include Authorization for Gift Cards, Incentives, and Prizes. Removed Apple iTunes Volume purchasing instructions.

Updates in July 2021 include removing Fixed Assets.

Updates in August 2021 include Pepsi Beverages language and Gift Card and Human Subjects/Research Participant language. Added Greenphire section. Replaced WordPress redirects for purchasing with <https://purchasing.ecu.edu/>.

Removed Apple App Purchasing, Central Stores Storeroom information, and Departmental Computer Purchases link update.

Updated Telecommunications section to Cellar and Pager Services. Updated Pre-Purchasing Checklist.

Updates to Gift Cards, Incentives, and Prizes section. 2/11/2022