



# PURCHASING UPDATE

January 2017

STATE OF UTAH

## TAX EXEMPTION FORMS

Beginning every January, vendors strive to make sure they are in compliance with the laws. Their audits find expired tax exemption forms and they reach out to the Division of Purchasing and General Services.

State Purchasing will supply the tax exemption form to vendors which hold a Best Value State Cooperative Contract. All other vendors are directed to obtain the tax exemption form from the agency or entity that is purchasing the commodities.

State Finance and Tax Commission have worked together to make the process of obtaining a tax exemption certificate easier for State Agencies. Just follow these easy steps:

1. Go to [finance.utah.gov](http://finance.utah.gov)
2. Click "Finance Forms" which is located on the right under DAS SERVICES
3. Roll to the bottom of the forms page and locate "TC-721G Exemption Certificate for Government & Schools"
4. If you are already logged into the State server, the document will open immediately, otherwise, the State employee will be requested to log in. The sales tax number self-populates based on the individual's agency.
5. Save the document to the hard drive.
6. Open the document from save location. Fill in the information and print.
7. Obtain the authorized signature.

### FINANCE QUICK LINKS

- ACCOUNTING POLICIES AND PROCEDURES
- CHART OF ACCOUNTS
- DATA WAREHOUSE
- DEBT COLLECTION
- DOWNLOADS
- ESS - EMPLOYEE SELF SERVICE
- FINANCIAL REPORTS
- FINELINE NEWSLETTER
- FORMS
- INTERNAL CONTROL
- PAYMENT PLUS FAQ
- PCI - CREDIT CARD COMPLIANCE
- PURCHASING CARD
- RATES AND FEE SCHEDULE
- TRAINING
- TRANSPARENCY IN UTAH
- TRANSPARENCY WEBSITE
- WHERE'S MY TAX REFUND
- UTAH NAVAJO TRUST FUND

### DAS SERVICES

- FINANCE FORMS
- BOARDS AND COMMISSIONS
- PUBLICATIONS, REPORTS, AND RATES
- BUDGET



- JVYE FI 61-AR - Accounts Receivable
- JVYE FI 61-AR - Accounts Receivable
- JVYE FI 61-DIR - Deferred Inflow Reclassifications
- JVYE FI 61-ER - Expenditure Refund
- JVYE FI 61-PE - Prepaid Expenditure
- JVYE FI 61-UR - Unearned Revenue
- JVYE FI 61 - All year-end accrual forms - (PDF file for hard copies with instructions)
- PYSA 1 - Payroll System Access Request Form
- TC - 721G Exemption Certificate for Governments & Schools
- Authorization to Make Pre-2006 Sick/Converted Sick Leave Balances Available for Paid Absences
- One-Time Irrevocable Authorization to Transfer all Program I (Pre-2006) Sick and Converted Sick Leave Hours to Program II



Other public entities should consult their finance group concerning their sales tax license number and fill out the TC-721G Certificate available on the [Tax Commission's form page](#).

**SPRING  
PROCUREMENT  
EDUCATION  
PARTNERSHIP  
SEMINAR  
REGISTRATION**

**PAGES 2 & 3**

#### INSIDE THIS ISSUE:

Spring Procurement Education Partnership Seminar	2
Seminar Agenda	3
State Cooperative Contract Search Engine Tips	4
Cooperative Contract: Parks & Recreation Equipment & Related Services	5
New, Extended, and Canceled State Cooperative Contracts	7-8

## SPRING PROCUREMENT EDUCATION PARTNERSHIP SEMINAR

The 2017 *Spring Procurement Education Partnership Seminar* (PEP Seminar) will be held Thursday, March 16 from 9 AM—4 PM. This seminar is jointly hosted by the State of Utah Division of Purchasing and the National Association of State Purchasing Officials (NASPO).

The PEP seminar includes lunch for those who register and attend the full-day session. There is no cost to attendees for the seminar or the lunch.

Registration ends on March 10; however, registration for individual classes may end sooner if capacity for the room is met. Click the link to register for [on location attendance](#) for the seminar.

The seminar sessions held in the Auditorium will be broadcast via webinar. Breakout sessions held in other rooms will not be broadcast. It is not known at this time which breakout session will be in the Auditorium. Click the link to register for [webinar attendance](#). Information and links for the seminar will be sent out by March 14.

Google will now send you an email containing your responses to the registration. After registration, if you do not receive an email, you either did not finish the registration process or you entered the wrong email.

A week prior to the seminar, you will receive an event reminder. [If you cannot attend, send an email immediately to teutsler@utah.gov](#) so that your meal can be canceled and save the State the expense. If you do not receive an email by March 14, a step was missed during your registration and your registration was not received.

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### Procurement Code and Administrative Rule Update

This training is to outline changes which are occurring to the Procurement Code and the Administrative Rule.

### Contract Administration & Introduction of Forms

This training will review the common areas of contract administration that are often overlooked and the issues that can arise when the areas are overlooked. It will also review forms that the Division of Purchasing uses to help with contract administration.

### Fraud Training

Based on UCA 63G-6a Part 24 Fraud, this training seeks to assist entities in avoid occurrences of fraud.

### Break Out Session #1 Choices:

#### Approved Vendor Lists--Creation and Use

The training will cover the process of creating approved vendor lists using requests for statements of qualifications, drafting the contracting documents, and how to use approved vendor lists, both as a buyer and assisting vendors and others.

#### Managed Service Provider Cooperative Contract – IT Professional Services

The training will outline the process for using the IT Professional Services component of the Managed Service Provider Cooperative Contract with Knowledge Services (IT2462), discuss the role Knowledge Services plays in the vendor selection process, and explain how this contract adds value to agencies.

#### Small Purchase of Professional Service Providers & Consultants—R33-5-108

The training will provide direction for procuring services using the R33-5-108 Small Purchase of Professional Service Providers and Consultants. It will discuss what procurements qualify and the process used by State Purchasing.

### Break Out Session #2 Choices:

#### Best Practices of Award of a Contract w/o Engaging in a Standard Procurement Process

The training will cover best practices when awarding a contract without engaging in a standard procurement process. The discussion will include sole sources, transition costs, and other circumstances that may make awarding a contract through a standard procurement process impractical.

#### Best Practices for Services Contracts

This session will focus on elements of a service solicitation/contract that may improve the service performance and simplify contract administration. These solicitation/contract elements may include detailed service description, identification of service exclusions, total project life cycle costs/budget, quality assurance thresholds, and performance evaluation requirements.

#### SciQuest Basics

This training will give direction in setting up your SciQuest account and illustrate creating a basic solicitation. We will also discuss the basics of how the vendor interacts with SciQuest.



DIVISION OF  
PURCHASING & GENERAL  
SERVICES

# PROCUREMENT EDUCATION PARTNERSHIP SEMINAR

HOSTED BY THE STATE OF UTAH, DIVISION OF PURCHASING AND NATIONAL ASSOCIATION OF STATE PURCHASING OFFICIALS

Time	Topic	Presenter
9:00 - 9:15	Welcome	Chris Hughes
9:15 - 9:30	Introduction of Purchasing's Agency Contacts	Jennifer Salts
9:30 - 10:00	Introduction to Purchasing's New Website / Highlight of State Cooperative Contracts	Windy Aphayrath, John Palmer, Jennifer Salts
10:00 - 10:45	Procurement Code and Administrative Rule Update	Kent Beers
10:45 - 11:00	Break	
11:00 - 12:00	Contract Administration & Introduction of Forms	Chris Hughes
12:00 - 1:00	Break	
Break Out Session 1	Approved Vendor Lists — Creation & Use	Zac Christensen
	Managed Service Provider Cooperative Contract – IT Professional Services	Fay Tan/ Solomon Kingston
	Small Purchase of Professional Services—R33-5-108	Jennifer Salts
1:00 - 1:50	Small Purchase of Professional Services—R33-5-108	Jennifer Salts
1:50 - 2:00	Break – Move to next session	
Break Out Session 2	Best Practices of Award of a Contract Without Engaging in a Standard Procurement Process	Spencer Hall
	Best Practices for Service Contracts — Tips for Developing Service Procurements and Contracts	Terri O'Toole
2:00 - 2:50	SciQuest Training	Windy Aphayrath
2:50 - 3:00	Break – Return to Auditorium	
3:00 - 4:00	Fraud Training	Kent Beers

DATE: Thursday, March 16, 2017  
 TIME: 9 AM – 4 PM (Sign-In from 8:30-9:00 AM)  
 LOCATION: State Office Building; 1st floor Auditorium  
 450 North State Street, Salt Lake City, Utah

***Registration closes March 10, 2017 or when capacity is reached***

On Location Attendance Registration ▶▶▶ [On Location Registration Link](#)

Webinar Registration ▶▶▶ [Webinar Registration Link](#)

NOTE: This training qualifies as "instructor-led" procurement training for the CPPB & CPPO certification requirements

## STATE COOPERATIVE CONTRACT SEARCH ENGINE TIPS

<http://purchasing.utah.gov/statecontractdirectory.html>

The statewide cooperative contract search page can be daunting. For example, if I am looking for office furniture and type *office furniture* in the search bar, sixty-five contracts are returned, and most of those have nothing to do with office furniture. The search page is bringing back every contract with the word *office* and every contract with the word *furniture*. Don't give up! The search process can be made easier when you understand how the search engine functions and employ the tips below.

### Tip #1: Use Quotes

When you put keywords in quotes, the search page will look for the exact phrase. For example, when I type "*office furniture*" in the search bar, eight contracts are returned, and all of the returned contracts are related in at least some way to office furniture.

### Tip #2: Use Alternative Keywords

Even with quotes, search results may not be perfect. For example, if I type "*office chair*" in the search bar, no contracts are brought back. However, if I type *seating* in the search bar, nineteen contracts are returned. Try to think of alternative keywords for the items you are looking for.

### Tip #3: Use/Don't Use Partial Words

The search page will bring back results when partial words are entered. For example, if I am looking for an interpreter, I might search on any of the following keywords: interpret, interpreter, interpreting, or interpretation. However, if I search on *interpre\**, all contracts with variations of the word are returned. Be aware that using partial words may hinder a search. If I am searching for a computer and enter *comp*, 209 contracts are returned. When I spell out the word *computer*, a more manageable fifty-four contracts are returned.

### Tip # 4: Use Advanced Search Features

The advanced search screen has a number of

search fields that can help in finding a particular item or vendor. For example, if I know the vendor is Henriksen Butler, but I can't remember how to spell the full name, I can type *henr* in the Vendor field, and five contracts, including three for Henriksen Butler, are returned. The advanced search screen also allows for searches by contract number and purchasing agent, among other things.

### Tip # 5: One Good Lead Method

Often times you will want to find competitors for a particular product or service. Contracts resulting from the same solicitation are assigned to the same purchasing agent. So, if you can find one contract, look to see which purchasing agent manages the contract, then search for all contracts assigned to that purchasing agent using the *Purchasing agent* field on the advanced search screen. Another method to find competitors is to search on the contract name. Competitor's contracts should be similarly named.

If all else fails, pick up the phone and call the State Cooperative Contract Help Desk at 801-538-3154 or email [sbird@utah.gov](mailto:sbird@utah.gov).

## Cooperative Contract: (NASPO ValuePoint) Parks & Recreation Equipment & Related Services

State Purchasing announces the new “Parks & Recreation Equipment and Related Services” portfolio of “Best Value” State Cooperative Contracts. We have signed participating addendum's with four vendors so far and anticipate signing with two more vendors.

Before choosing a vendor, an entity should review the Summary Document, Pricing Document, and, as needed, the Full Contract to determine what the vendor/authorized dealer is contracted to sell.

As the contracts are different, agencies should carefully review factors before making a procurement decision such as: Warranty, Delivery Schedule, Delivery Costs, Product Offering and Pricing, Installation Charges, and Other Services Offered.

Products offered on these contracts include items such as Playground Equipment, Benches, Bleachers, Tables, Shelters, Playground Surfacing, Outdoor Fitness

Equipment, Sports Goals and Equipment, Skate Park Equipment, Dog Park Furnishing, and Splash Pad products.

Services such as installation, site work, and repairs are also offered under this portfolio.

A contact is listed on the contract summary document. Quotes should be requested and orders placed through the listed vendor contact.

If you have any questions about these contracts, please contact Chad Hinds at [chinds@utah.gov](mailto:chinds@utah.gov) or 801-538-1287.



Contract	Vendor
MA2566	Superior International Industries, Inc.
MA2567	[waiting vendor signature]
MA2568	Playworld Systems, Inc.
MA2569	Rubberecycle, LLC
MA2570	[waiting vendor signature]
MA2571	Landscape Structures, Inc.



## STATE OF UTAH

Division of Purchasing  
3150 State Office Building  
Capitol Hill Complex  
PO Box 141061  
Salt Lake City, UT 84114

Phone: 801-538-3026



**We're on  
the Web!**

[purchasing.utah.gov](http://purchasing.utah.gov)

### **UPCOMING PEP SEMINARS**

**Mar 16, 2017**

**Jun 15, 2017**

Note: PEP Seminars are  
now be held on  
Thursdays.

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### **HOW TO RECEIVE THE PURCHASING UPDATE NEWSLETTER**

Did you receive this newsletter from a co-worker? Do you want to receive the Purchasing Update directly? Please follow the appropriate steps below.

(A) Individuals who have a State Google email account:

Step 1: Enter into GROUPS in the State Google email account

Step 2: In the new window's search field, type PURCHASING NEWSLETTER

Step 3: Google will list the "Purchasing Newsletter" as a group. Select the group.

Step 4: Click JOIN GROUP.

Step 5: In the new window, click JOIN GROUP. The administrator will be informed of your request and approve it.

(B) Individuals that do not have a State Google email account:

Please send an email to John Palmer, [johnpalmer@utah.gov](mailto:johnpalmer@utah.gov).

**NEW STATE OF UTAH “BEST VALUE” COOPERATIVE CONTRACTS**

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
Video Production and Editing Services	AV2543	Lone Peak Productions	11/1/2016 — 10/31/2021	Other vendors for this Approved Vendor list are in the table on the summary sheets. Users must follow the instructions for use outlined on the summary sheets.
Video Production and Editing Services	AV2555	Main Frame Digital	11/1/2016 — 10/31/2021	
GMC	AV2575	Nelson Auto Center	1/6/2017 — 10/5/2021	Other vendors for this Approved Vendor list are in the table on the summary sheets. Users must follow the instructions for use outlined on the summary sheets.
GMC	AV2576	Young Buick GMC Co	1/6/2017 — 10/5/2021	
Honda	AV2578	Young T/H Co. dba Young Honda	1/6/2017 — 10/5/2021	
Parks & Recreation Equipment and Related Services (NASPO ValuePoint)	MA2568	Playworld Systems, Inc.	1/01/2017 — 12/01/2017	Users should review the six parks and recreation equipment contracts for products and pricing comparisons and determine which procurement item best meets the needs of the procurement unit. The other contracts are listed on the summary sheets.
	MA2566	Superior International Industries, Inc.	1/01/2017 — 12/01/2017	
	MA2569	Rubberecycle, LLC	1/01/2017 — 12/01/2017	
	MA2571	Landscape Structures, Inc.	1/01/2017 — 12/01/2017	
Small Package Express Air, Ground and International Delivery Service	MA065	United Parcel Service	11/28/2016–11/27/2021	New contract with the same vendor
Small Package Express Air, Ground and International Delivery Service	MA454	Federal Express Corporation	11/28/2016–11/27/2021	New contract with the same ven

\*The brief information in this newsletter is intended to highlight new contracts and contract changes. Always read the entire contract information sheet prior to making a purchasing decision.

**EXTENDED STATE OF UTAH “BEST VALUE COOPERATIVE CONTRACTS**

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TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION

**EXPIRED OR CANCELED STATE OF UTAH “BEST VALUE COOPERATIVE CONTRACTS**

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TITLE	CONTRACT	VENDOR	END DATE	ADDITIONAL INFORMATION
Public Cloud Hosting Services (NASPO ValuePoint)	MA272	Dell Marketing L.P.	1/20/2017	

Not all expired or canceled contracts make it to this list. Always check the contract online to determine if it is still active.

State of Utah “Best Value” Cooperative Contracts Search Engine location:

<http://purchasing.utah.gov/statecontractdirectory.html>