Procedures for purchasing goods and services from $5,000 to $49,999.99 and for purchases of $50,000 or more

1. Department requests pricing “quote” from Supplier.
2. Supplier provides quote in electronic format (example, PDF file) and send to Department via email.
3. Department forwards the Supplier’s email with the attached quote to the Strategic Supplier Program (sspapproval@umich.edu) along with the following information:
   ✓ Complete chartfield combination
   ✓ ShortCode
   ✓ Short statement requesting to purchase the equipment
4. The Strategic Supplier Group reviews requests.
   A If the fund is “non-sponsored,” does not require OSEH approval, and/or does not require Hospital Capital approval, the Department is given authorization to place the order with the Supplier.
   B If the order requires routing to Sponsored Program, OSEH, of Hospital Capital, the email is forwarded requesting authorization. Once the Strategic Supplier Program receives an email granting authorization, SSP emails the department that it has authorization to place the order with the Supplier. If the request is denied, SSP notifies the department and the sales representative.
   C If the order does not require modification to the facility (structural, major cosmetic, electrical, electrical load survey, air conditioning load survey) the department will only need to gain approval through the SSP.
   D If the order does require modification to the facility (structural, major cosmetic, electrical, electrical load survey, air conditioning load survey) the department is to contact Plant Operations/AEC for quote approval, blueprint review and project approval. Additional inspections (electrical, structural, final) may apply.
5. The Strategic Supplier group files the approval and sends an authorization to pay to the University. If Products are sold, shipped, processed or billed without the Strategic Supplier authorization, the invoice for non-authorized sales will not be paid. It will be the responsibility of the Supplier for all return costs for the Products.
6. The Supplier processes the order and invoices the University via the Service Unit Billing Format.
7. The Supplier provides a copy of the order Packing List to the Department with the shipment and a copy is sent to Property Control Office, 2054 Wolverine Tower, 3003 S. State Street, Ann Arbor, MI 48109-1273. The Packing List contains the following information:
   ✓ Name of U of M Contact Person
   ✓ Building Room Number
   ✓ Street Address
   ✓ U of M contact telephone number
   ✓ Product Description including Manufacturer and Model Number(s)
   ✓ Serial Number (s) of Equipment
   ✓ The FAR reaffirmation statement. Language contained in the Service Level Agreement.
1.1 Design

1.1.1 Requestor contacts building IT representative and facility manager (if applicable).
1.1.2 Requestor contacts Strategic Supplier for a Quote or Site Survey.
1.1.3 Requestor contacts SSP (see Exhibit E procedures) with the quote if greater than $5,000.00.
   1.1.3.1 The SSP is to review quotes between $5,000.00 and $50,000.00.
   1.1.3.2 The requestor will submit an E-Pro Requisition to Procurement Services, attention to their respective buyer or buying team with quotes in excess of $50,000.00.
1.1.4 Requestor, along with Strategic Supplier contact AEC and/or Plant Ops for design coordination (see Exhibit E procedures, Section 4, C & D) if there are modifications to the facility (structural, major cosmetic, electrical, electrical load survey, air conditioning load survey).
   1.1.4.1 Conduct electrical and/or AC load surveys
   1.1.4.2 Quote/Blueprint Approval
   1.1.4.3 Project Approval
1.1.5 Unless otherwise noted by AEC as to the expectations needed to complete a project, the design consultant will be required to adhere to the Design Guidelines for the design and construction of facilities at the University of Michigan. These guidelines cover such items as front end documents, specifications, and design phase deliverable requirements. This information is available on the UM Plant Extension website at the following address:
   http://www.plantext.bf.umich.edu/desguide/index.html
1.1.6 Depending on the amount of the professional design fee, there are two different additional contractual agreements that could be used (described below). Both of these agreements are available on the UM Plant Extension website at the following address:
   http://www.aec.bf.umich.edu/for.archs/TemsAndConditions.html

For professional fees less than $100,000, please refer to, “The University of Michigan Purchase Order Terms & Conditions for Professional Services (AE Jan 2001)”. For professional fees equal to, or over $100,000, please refer to the “Agreement between Owner and Design Professional” for a detailed outline of the contractually required services, as the awarded firm will be required to comply with all requirements.

1.1.7 At the point where the design becomes implemented, requestor and Strategic Supplier will work with AEC (Project Manager) or Plant Ops (Project Manager) to be sure proper facilities procedures are adhered to.
   1.1.7.1 Inspections
   1.1.7.2 End-user Training
   1.1.7.3 Product Manuals
   1.1.7.4 Sign-Off

1.2 Equipment
1.2.1 Requestor contacts building IT representative and facility manager (if applicable).
1.2.2 Requestor contacts Strategic Supplier for a Quote or Site Survey.
1.2.3 Requestor contacts SSP (see Exhibit E procedures) with the quote if greater than $5,000.00.
   1.2.3.1 The SSP is to review quotes between $5,000.00 and $50,000.00.
   1.2.3.2 The requestor will submit an E-Pro Requisition to Procurement Services, attention to their respective buyer or buying team with quotes in excess of $50,000.00.
1.2.4 Requestor, along with Strategic Supplier contact AEC and/or Plant Ops for design coordination (see Exhibit E procedures, Section 4, C & D) if there are modifications to the facility (structural, major cosmetic, electrical, electrical load survey, air conditioning load survey).
   1.2.4.1 Conduct electrical and/or AC load surveys
   1.2.4.2 Quote/Blueprint Approval
   1.2.4.3 Project Approval

1.3 Installation.

1.3.1 Requestor contacts building IT representative and facility manager (if applicable).
1.3.2 Requestor contacts Strategic Supplier for a Quote or Site Survey.
1.3.3 Requestor contacts SSP (see Exhibit E procedures) with the quote if greater than $5,000.00.
   1.3.3.1 The SSP is to review quotes between $5,000.00 and $50,000.00.
   1.3.3.2 The requestor will submit an E-Pro Requisition to Procurement Services, attention to their respective buyer or buying team with quotes in excess of $50,000.00.
1.3.4 Requestor, along with Strategic Supplier contact AEC and/or Plant Ops for design coordination (see Exhibit E procedures, Section 4, C & D) if there are modifications to the facility (structural, major cosmetic, electrical, electrical load survey, air conditioning load survey). Supplier will not pull electrical wire or install conduit without proper approval through AEC (http://www.aec.bf.umich.edu/services.html) and/or Plant Ops (7-2059). The requestor must contact Plant Ops (7-2059) to request this work through Plant Ops and have a Work Order number.
   1.3.4.1 Conduct electrical and/or AC load surveys
   1.3.4.2 Quote/Blueprint Approval
   1.3.4.3 Project Approval
1.3.5 At the point where the installation is implemented, requestor and Strategic Vendor will work with AEC (Project Manager) or Plant Ops (Project Manager) to be sure proper facilities procedures are adhered to.
   1.3.5.1 Inspections
   1.3.5.2 End-user Training
   1.3.5.3 Product Manuals
   1.3.5.4 Sign-Off

1.4 Maintenance.

1.4.1 Requestor contacts building IT representative and facility manager (if applicable).
1.4.2 Requestor contacts Strategic Supplier for a Quote or Site Survey.
1.4.3 Requestor contacts SSP (see Exhibit E procedures) with the quote if greater than $5,000.00.
   1.4.3.1 The SSP is to review quotes between $5,000.00 and $50,000.00.
   1.4.3.2 The requestor will submit an E-Pro Requisition to Procurement Services, attention to their respective buyer or buying team with quotes in excess of $50,000.00.
1.4.4 Requestor, along with Strategic Supplier contact AEC and/or Plant Ops for design coordination (see Exhibit E procedures, Section 4, C & D) if there are modifications to the facility (structural, major cosmetic, electrical, electrical load survey, air conditioning load survey). Supplier will not pull electrical wire or install conduit without proper approval through AEC (http://www.aec.bf.umich.edu/services.html) and/or Plant Ops (7-2059). The requestor must contact Plant Ops (7-2059) to request this work through Plant Ops and have a Work Order number.
   1.4.4.1 Conduct electrical and/or AC load surveys
   1.4.4.2 Quote/Blueprint Approval
   1.4.4.3 Project Approval
1.4.5 At the point where the installation is implemented, requestor and Strategic Vendor will work with AEC (Project Manager) or Plant Ops (Project Manager) to be sure proper facilities procedures are adhered to.
   1.4.5.1 Inspections
   1.4.5.2 End-user Training
   1.4.5.3 Product Manuals
   1.4.5.4 Sign-Off