

Texas State Board of Pharmacy

Purchasing Policy and Procedure Manual and Contract Management Guide

Rev. 10/21

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REQUISTION PROCESS

Introduction and Definitions

It is the responsibility of end users of goods or services to define their needs for goods or services and obtain appropriate approval for such. It is the responsibility of the agency purchaser to issue purchase orders in accordance with all statutes, policies, procedures, and guidelines to external vendors.

End users are agency staff who will use any goods or services obtained through the purchase process.

A requisition is an internal request from an agency unit for goods or services required for agency duties. This documents the need for the goods or services, the estimated cost, and approval by management, as well as any other details that need to be documented to successfully make the purchase.

Requisitions are to be created on the form the agency designates. Purchasing will provide advice and training on completion of requisitions as needed. Purchasing may request any authorized user to create requisitions for items they are requesting.

Requisitions are not purchase orders. Purchase orders are a type of contract authorizing purchase of goods or services and are directed to a vendor outside the agency. Only the agency purchaser may authorize purchase orders.

Requisition Approvals

Any agency directors or managers *that report directly to the Executive Director* may approve requisitions for their unit, or other units as required by circumstances, up to \$5,000.00. The purchaser will use a current agency organization table to determine which staff are directors.

Purchases of \$25.00 or less do not require formal approval. The agency purchaser may issue a purchase order for \$25.00 or less on his own authority.

Purchases over \$5,000.00 require the executive director's approval.

Any purchase of IT-related goods or services requires additional approval by the IT manager.

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Staff designated as managers should provide an initial informal approval (via e-mail or other means of documentation) for requests for use by their particular business unit. Formal approval by a director is still required in such cases.

Requisitions are to be approved for a specified amount. If the cost of the purchase increases by over \$25.00, additional approval is required.

Budget Control

Approved requisitions are to be directed to the Director of Finance or her designee to assign a budget index (PCA), comptroller object (COBJ), and fiscal year (AY) prior to making a purchase.

Purchaser Role

The agency purchaser will make every effort to obtain the goods or services as specified on the requisition. The purchaser will determine the correct process to do so. The purchaser will select the vendor and determine the actual cost of the purchase.

Reporting

The agency purchaser will provide a weekly report of requisitions received to the executive director. The report will include brief descriptions of the goods or services, costs, approval status, and any other details as required.

Requisition Form and Standards

Requisitions are to be on a form designated by the agency. Due to constraints of telecommuting and mandates to reduce the use of paper, the agency is using electronic forms where practical. The agency is using a form that is compatible with the purchase order form (eg, an Excel-based requisition that allows the purchaser to copy information into an Excel-based purchase order).

- An electronic copy of the requisition will be sent to the approver.
- The approver will add an electronic signature.
- The approver will send the electronic copy to the purchaser.
- The purchaser will save the electronic copy of the requisition in a network folder for the specific purchase order it is attached to.

Writing Requisitions: Specifications and Cost

Requisitions must include a description of the goods or services required, the price, the quantity to be ordered, and the unit of measure. Purchasing can provide assistance in writing requisitions. It is the responsibility of end users to know what goods or services are required for agency duties.

Specifications

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Descriptions must be complete and concise. Descriptions are copied from requisitions to purchase orders, so they must accurately reflect the agency’s needs. Incorrect or incomplete descriptions may result in delays, returns, and overcharges.

Copying descriptions from catalogs, previous requisitions or purchase orders, websites, Texas SmartBuy and similar sources is encouraged.

Examples of vague or incomplete descriptions:

- “The paper we usually get.”
- “Attend conference on Tuesday.”
- “Print the forms on three-part paper.”

Examples of complete descriptions:

- Hammermill Fore Multipurpose Paper - Letter - 8 1/2" x 11" - 20 lb Basis Weight - 0% Recycled Content - 96 Brightness - 5000 / Carton – White.
- Registration fee for TSBP employee Jane Doe to attend Texas Pharmacy Association Annual Conference on 4/3/19 in Austin, TX.
- Printing of TSBP Form 12A, 8.5”x11” three-part NCR paper, black ink, front and back, bind along top edge, quantity 2,500.

Cost

The purpose of the requisition approval process is to document approval for an expenditure. In order to do so requisitions must include an estimated price which determines how much the agency can spend.

Price is the cost of a single unit, quantity is the number of units. Unit of Measure is the unit the thing is sold in (EA for single units, BOX for boxes, CTN carton, DOZ dozen, JOB for single jobs, etc.). The requisition form will multiply the unit cost by the quantity to calculate the extension cost (total cost).

Item #	Description	Quantity	Unit	Unit Cost	Extension
1	Dell Wireless Keyboard & Mouse - KM636	35	EA	\$169.99	\$5,949.65

Requisitions can include multiple lines if they are all part of the same purchase. Shipping costs are a common reason to have more than one line.

Item #	Description	Quantity	Unit	Unit Cost	Extension
1	Kraft Mailing Tubes with End Caps - 2 x 15", .060" thick, S-3936	850	EA	\$0.75	\$637.50
2	Plastic Stackable Bins - 11 x 4 x 4", Blue, S-13536BLU	12	EA	\$2.90	\$34.80
3	Shipping	1	EA	\$138.57	\$138.57

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PRE-PURCHASE REQUIREMENTS

The agency purchaser is responsible for ensuring that any and all requirements related to state purchasing statutes are met prior to awarding a contract or making any purchase. The purchaser will not proceed with awards, contracts, or purchase orders until all requirements are met.

The purchaser will purchase goods and services from Texas Correctional Industries (TCI) and WorkQuest (formerly TIBH) to the extent that they are available and meet the agency's needs.

The Prison Made Goods Act requires that agencies purchase goods made by and services offered by TCI. Competitive bidding is not required for items purchased from TCI under the Prison Made Goods Act. The purchaser will obtain a waiver from TCI if the agency desires to procure a product or service offered in the TCI catalog from a source other than TCI. The waiver request can be based on substantial differences in specifications. An agency may not evade the intent of Prison Made Goods Act by requesting a product that varies slightly from standards for products established under Section 497.027 of the Texas Government Code. Waivers are issued by TCI and they have the final say in the decision to grant or refuse an exemption.

The agency must purchase products and services offered through WorkQuest that meet the applicable specifications of the agency and that are available within the time specified. Competitive bidding is not required for purchases from TIBH. WorkQuest does not grant waivers or exemptions. The purchaser will document all exceptions to purchases from WorkQuest.

Purchases for DIR-controlled class and item goods and services (items marked with a star in the state's listing of NIGP codes) are to be bought under a current DIR contract or else have an exemption. If the exemption is a blanket exemption, the purchaser will document the exemption and proceed with the purchase. If the purchase requires a one-time exemption, the purchaser will follow the process established by DIR. Requestors are expected to assist by providing relevant information relating to the justification for the exemption (price, proprietary items, compatibility, training needs, or other circumstances). Exemptions are issued by DIR and they have the final say in the decision to grant or refuse an exemption.

The purchaser is responsible for posting print job requests to the state portal. Requestors are expected to assist by providing relevant details to create a statement of work (SOW) used to obtain print job quotes. The portal is used for print jobs expected to be over \$2,500.00 in value. For jobs expected to be less than \$2,500.00 in value the purchaser will request informal quotes from state agency print shops, which include TCI.

For delegated purchases over \$5,000.00 in value the purchaser is required to request quotes from no less than three sources. The purchaser will include HUB vendors in sources to the extent that is possible. An informal quote process may be used for low value, low-complexity purchases at the purchaser's discretion.

For non-delegated purchases that cannot be awarded under interagency or state contracts (SPD term contracts, TXMAS, or DIR), the purchaser will seek delegation from the Comptroller of Public Accounts. On receiving delegation the purchaser will conduct a formal solicitation process. Requestors are expected to provide full assistance in developing specifications, evaluating responses, and providing subject-matter expertise as needed. Solicitations will be carried out in conformity with all statutes, policies, and guidelines

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established for state purchasing. See the Texas Procurement and Contract Management Guide and TSBP's Contract Management Guide for greater detail.

For IT-related purchases that require DBITS, QAT, or other DIR directed processes, the purchaser will comply with statutes, guidelines, and procedures set down by DIR and CPA.

For professional services as defined under the Professional Services Act, the purchaser will obtain required delegation and conduct solicitations as needed. For legal and consulting services the purchaser will obtain required delegation and conduct solicitations as needed. Sec. 2151 of the State Purchasing and General Services Act does not apply to:

- (1) obtaining outside legal counsel services;
- (2) obtaining expert witnesses; or
- (3) procuring litigation-related goods and services for which competitive procurement is not feasible under the circumstances.

For proprietary or sole-source purchases over \$5,000.00, the agency will create appropriate memos and letters to the file or the Comptroller of Public Accounts to justify the need for a non-competitive procurement. All justification memos and letters are to be signed by the executive director.

PURCHASE ORDERS

The agency purchaser is responsible for creating and dispatching purchase orders (POs). Staff who have completed the Basic Texas Purchaser Course may issue purchase orders up to \$10,000.00 in value. Staff certified as CTPM or CTCD may issue purchase orders of any value. The agency purchaser will determine the procurement method and vendor.

Before issuing a PO, except for particular exceptions, the purchaser must review and print the vendor's profile on the Certified Master Bidder List (CMBL) and System for Award Management (SAM). The purchaser must review the current debarred list. No PO may be awarded to any vendor on the SAM excluded list or on the Comptroller's debarred list. POs created under term contracts (TPASS, TXMAS, DIR, or other), or issued to set aside vendors (TIBH or TCI), and interagency contracts are not required to have these documents. POs for memberships are required to have a lobby report from the Texas Ethics Commission verifying that the membership is not in a group that employs lobbyists. Memberships must also have a membership approval form signed by the executive director.

Purchase orders may import a requisition's lines. The purchaser will enter a PO name, HUB information, purchasing method and PCC, as well as any required notes, attachments, contract numbers, etc to complete the PO. All purchase orders are entered in CAPPs for budget purposes. The agency may use agency-developed forms to serve as purchase orders to send to vendors.

NOTE: Ensure that all budget data is correct before importing a requisition into a PO. It is extremely difficult to change budget distributions on a PO.

Each PO has a unique number in sequential order. The purchaser records each PO in a PO Log in the form of a spreadsheet. The purchaser records:

1. PO cost
2. Budget index

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3. SmartBuy PO number
4. Vendor name
5. Brief description of the goods or services
6. Purchaser initials
7. Vendor HUB type
8. Purchase type
9. PCC code
10. NIGP class
11. NIGP item
12. Date issued
13. Expected date of receipt

Completed POs are filed in numerical order. PO files are to include the vendor's CMBL print out, SAM report, and a current debarred list. Relevant internal and external correspondence, quotes, waivers, notes, justifications, catalog pages, and other documentation may also be included in the file. Membership approvals must be forwarded to the accounts payable accountant and the record copy resides in the voucher file.

PURCHASE ORDER CHANGE NOTICES (POCN)

Purchase Order Change Notices (POCN) must be used to effect any changes once an order is issued. If changes need to be made to a Term contract, the POCN is initiated in the TxSmartBuy database. All changes to price or product descriptions are recorded in CAPPs. Changes in terms or bid specifications may require a separate SOW and written POCN. Written POCNs that require mutual agreement to be effective must be countersigned by a vendor representative.

Cancellations on purchase orders, either of the whole PO or single lines, are considered POCNs.

RECEIVING

When a shipment arrives, the receptionist will notify Purchasing or Accounting. If the delivery is large, the delivery person will be directed to the dock where Purchasing or Accounting will meet them and receive the shipment (if inside delivery was not requested).

Before accepting shipments, the person receiving should inspect the shipping containers for any visible damage and ensure that all the containers are present. Any discrepancies should be noted on the shipping documents.

When merchandise is being unpacked, it should be checked against a copy of the purchase order. The date of receipt and initials of the person checking in the merchandise should be noted. The person(s) requesting the items will be notified.

A packing slip is considered a receiving report. The purchaser may provide an agency form as a receiving report if no packing slip or vendor documentation is provided. The purchaser will date stamp the receiving report, initial it, and add notes (back-ordered, partial shipment, damage, etc) as needed. The purchaser will scan the receiving report.

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All required receipts are completed in CAPPs. The scanned receiving report will be uploaded to the receipt in CAPPs. The purchaser will forward the receiving report with the receipt number noted and a copy of the vendor's SAM report (if required) to the accounts payable accountant for inclusion with the voucher file.

NOTE: Scanned documents uploaded in the purchasing portions of CAPPs (requisitions, purchase orders, receipts) are not accessible from the voucher module. Printed copies of required documents should be provided to the accountant.

PROTEST AND DISPUTE RESOLUTION

Any actual or prospective bidder who is aggrieved in connection with the solicitation, evaluation, or award of a contract may formally protest to the Executive Director of the Texas State Board of Pharmacy. Such protests must be in writing and received in the Executive Director's office within 10 working days after such aggrieved person knows, or should have known, of the occurrence of the action, which is protested. Copies of the protest must be mailed or delivered by the protesting party to Texas State Board of Pharmacy and other interested parties.

In the event of a timely protest or appeal under this policy, Texas State Board of Pharmacy shall not proceed further with the solicitation or with the award of the contract unless the Executive Director, after consultation with the Purchaser, and Texas State Board of Pharmacy's management staff, makes a written determination that the award of the contract without delay is necessary to protect interests of the state.

A formal protest must be sworn to and contain the following information and/or documentation:

1. a specific identification of the complaint;
2. a specific description of each act alleged to have violated the statutory or regulatory provision(s) pursuant to Chapter 2260 of the Texas Government Code;
3. a precise statement of the relevant facts;
4. an identification of the issue or issues to be resolved;
5. argument and authorities in support of the protest; and
6. a statement that copies of the protest have been mailed or delivered to Texas State Board of Pharmacy and other identifiable interested parties.

The Purchaser shall have the authority, prior to appeal to the Executive Director, to settle and resolve the dispute concerning the solicitation or award of a contract. The Purchaser may solicit written responses to the protest from other interested parties. If the protest is not resolved by mutual agreement, the Purchaser will issue a written determination on the protest.

1. If the Purchaser determines that no rules or statutory violations have occurred, he/she shall inform the protesting party, the Executive Director, and other interested parties in writing setting forth the reasons for the determination.
2. If the Purchaser determines that a violation of the rules or statutes has occurred in a case where a contract has not been awarded, he/she shall inform the protesting party, the Executive Director, and other interested parties in writing setting forth the reasons for the determination and the appropriate remedial action.

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3. If the Purchaser determines that a violation of the rules or statutes has occurred in a case where a contract has been awarded, he/she shall so inform the protesting party, Executive Director, and other interested parties in writing setting forth the reasons for the determination, which may include voiding the contract. The Purchaser's determination on a protest may be appealed by an interested party to the Executive Director. An appeal of the Purchaser's determination must be in writing and must be received in the Executive Director's office no later than 10 working days after the date of the Purchaser's determination. The appeal shall be limited to review of the Purchaser's determination. Copies of the appeal must be mailed or delivered by the appealing party to Texas State Board of Pharmacy and other interested parties and must contain an affidavit that such copies have been provided.

The Executive Director shall review the protest, Purchaser's determination, and the appeal and make a decision. The Executive Director may, at his/her discretion, refer the matter to the Comptroller for their consideration or issue a decision on the protest.

When a protest has been appealed to the Executive Director and has been referred to the Comptroller by the Executive Director, the following requirements shall apply.

1. Copies of the appeal, responses of interested parties, if any, and Executive Director's recommendation or written decision shall be mailed to the Comptroller, the appealing party, and other interested parties.
2. The Comptroller's determination of the appeal shall be final.

Unless good cause for delay is shown or the Comptroller determines that a protest or appeal raises issues significant to procurement practices or procedures, a protest or appeal that is not filed in a timely manner will not be considered.

A decision issued either by the Comptroller, or in writing by the Executive Director, shall be the final administrative action.

PROCUREMENT CARD POLICY

1) Overview

The purpose of the Procurement Card program is to establish a more efficient, cost-effective method of purchasing and paying for small dollar transactions as well as high-volume, repetitive purchases. The program is designed as an alternative to the traditional purchasing process for supplies and services. If used to its potential, the program will result in a significant reduction in the volume of purchase orders and related documentation including invoices and vouchers. In addition, corresponding work processes associated with ordering and voucher processing will be eliminated. The Procurement card can be used with any supplier that accepts MasterCard as a form of payment.

The following important points should be reviewed before using the Procurement Card:

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- The Procurement card is issued in the name of the cardholder. All purchases made on the Procurement card will be made only with the cardholder's authority. The cardholder is responsible for the security of the Procurement card and the transactions made with it.
If cardholders do not follow guidelines when using the Procurement card, they can receive corrective action, including termination.
- Cardholders can use the Procurement card at any vendor or service provider that accepts MasterCard and is not on the restricted list. It may be used for in-store purchases, mail, and telephone or fax orders.
- Cardholders may use the Procurement card to purchase supplies and services less than the Single Transaction Limit that was established.
- Use must not exceed the credit limit assigned to the Procurement card in a given month.
- The Purchaser and an Accountant will reconcile the statement received from Citibank to ensure all charges are accurate. Statement reconciliation needs to be completed within seven days of receipt of your statement.
- The Procurement card is not intended to avoid nor bypass appropriate purchasing or payment procedures. This program compliments the existing processes available.
- The Procurement card is not for **personal** use.
- The Procurement card must be returned to the Program Administrator upon your transfer or termination.

2) Duties and Responsibilities

Program Administrator

A Program Administrator will be designated by the TSBP for questions, issues and administration of the program. This person will be knowledgeable on all procedures in the Cardholder User's Guide. The Program Administrator has a direct relationship with Citibank. All Procurement card requests must go through the Program Administrator.

Cardholder

The person designated by the department manager to utilize the Procurement card by purchasing small dollar supplies and services is the cardholder. The cardholder is responsible for following the guidelines provided by the TSBP in regards to purchases, selection of vendors, security of card and monthly reconciliation.

3) Procurement card Controls

Credit Limits

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All Procurement cards have a monthly cardholder spending limit of \$5,000.

Each cardholder will be given information on the limits of his/her card upon signing up for the program. In order to change limits on any card, your department manager should complete a request and forward to the Program Administrator. The Program Administrator will then update the cardholder information in the Citibank database.

Transaction Limits

Your Procurement card will have a single transaction limit and a daily limit.

\$1,000 is the amount available on the Procurement card for a single purchase.

\$5,000 is the amount available on the Procurement card for the daily limit.

A transaction includes the purchase price plus freight. Cardholders should not attempt to make a purchase greater than his/her approved amount. Changes to the transaction limit must also be handled by the Program Administrator.

Restricted Vendors

The Procurement card program may be restricted for use with certain types of suppliers and merchants. If you present your Procurement card for payment to these vendors, the authorization request will be declined. If you think a particular vendor should be added or deleted, contact the Program Administrator.

4) Procedures

Procurement cards will be distributed through the Program Administrator. When a new card is issued, Citibank will send it to the Program Administrator for distribution to the cardholders. Cardholders will receive the Procurement Card Policy and sign the Cardholder Agreement.

Procurement card activation

The cardholder must call the number on the Procurement card to activate before using it. Upon receipt of the card, the cardholder should sign the back of the Procurement card. The Procurement card will be kept in the TSBP safe when not in use.

Making the Purchase

- a) Determine if the transaction is an acceptable use of the card, and if it is within the cardholder's spending limit.
- b) Create a requisition in CAPPs. Recurring charges will require multiple lines.
- c) Identify the supplier.
- d) Place your order online or by phone. Fax and mail
- e) If order is by mail, specify cardholder name, TSBP and shipping instructions. Also, specify the Procurement card number, expiration date and name as it appears on the card.
- f) Request that tax be excluded.
- g) Confirm pricing, tax exemption and freight.
- h) Request that a hard copy of the pricing, tax exemption and freight be e-mailed or faxed to the cardholder and/or include it in the shipment of supplies.

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- i) Enter the purchase in the Purchasing log.

Receiving Supplies and Services

A copy of the charge slip, sales receipt or any other information related to the purchase must be held in purchasing file.

Invoices with no amount due, are the most optimal documentation since they itemize the purchases and show any sales tax that may have been charged. If a purchase is made via mail or telephone, ask the vendor to include the receipt with the goods when shipping the product. The receipt is the only original documentation specifying tax paid on the purchase.

Procurement card Payment

Cardholders do not pay their own monthly statement. The program does not affect your credit rating in any way. The Procurement card program carries corporate, not individual, liability.

Accounting will forward the monthly invoice to the purchaser. The purchaser will match all charges to requisitions in CAPPs. The purchaser will create a PO in CAPPs for that invoice and copy all relevant requisition lines (ie either the entire requisition, or single lines for recurring charges) into the PO. The PO is to be coded PCC H, entered in the PO log and filed.

Forward all documentation to the Accounting department for reconciliation when the Citibank bill arrives

Returns, Credits and Disputed Charges

Should a problem arise with a purchased item, service or charges, every attempt should be made to first resolve the issue directly with the vendor. Review of future statements is vital to ensure the account is properly credited for returns, credits and disputed charges. The returned, credited or disputed item should be noted in the Purchasing log.

- a) Returns: If a cardholder needs to return an item to a vendor, contact the vendor and obtain instructions for return. Note that some vendors may charge a restocking or handling fee for returns.
- b) Credits: If an item is accepted as a return by the vendor, a credit for this item should appear on the following month's statement.
- c) Disputed charges: If the accountant finds a discrepancy on a monthly statement, the accountant should contact the vendor and attempt to resolve the problem directly.

If a cardholder cannot resolve a disputed item directly with the vendor, the cardholder should contact Citibank to place the charge in a "State of Dispute" and the account may be given a provisional credit until receipt of adequate documentation for the vendor.

5) Security of the Procurement card

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The cardholder is responsible for the security of the card. This card should be treated with the same level of care as the cardholder would use with his/her own personal charge cards. Guard the Procurement card account number carefully.

It should not be posted in a work area, or left in a conspicuous place.

After use of the Procurement card, return it to the safe located in the Director of Administration's office.

*The only person authorized to use the Procurement card is the cardholder. For those purchases in the field (example: vehicle repairs) the field staff will contact the card holder with an estimate of the costs for approval by the Department Director. When the service has been performed, the field staff will have the **vendor** call the cardholder for the Procurement card number.

The card is to be used for business purposes only.

Employee Termination

The Procurement card must be returned to the Program Administrator upon your transfer or termination.

Lost or Stolen Cards

If a Procurement card is lost or stolen, immediately contact Citibank's Customer Services at 1-800-890-0669. After contacting Citibank, notify the Program Administrator. Prompt action can reduce the TSBP's liability of fraudulent activity.

6) Current Program Administrator and Cardholders

Program Administrator: Raul Pacheco

Cardholder: Todd Hayek

Cardholder: Chantell Solomon

Cardholder: David Hardy

REPORTS

The purchaser is responsible for filing such required reports as fall under the purview of purchasing. The list is not comprehensive and may be adjusted to include ad hoc reports or new reports as required by oversight agencies.

Legislative Budget Board reporting

The agency is required to report the following contracts by the correct deadline. Values include non-appropriated funds (ie third party payments under the auspices of a TSBP contract)

Type of Contract	Value Threshold	Deadline
All	\$50,000.00 or greater	End of fiscal year
Construction	\$14,000.00 or greater	10 days after award
Professional of Consulting Services	\$14,000.00 or greater	10 days after award

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Major Information Systems	\$100,000.00 or greater	10 days after award
Proprietary or sole-source	\$1,000,000.00 or greater	10 days before 1 st payment
Emergency	\$1,000,000.00 or greater	48 hours after payment
All	\$10,000,000.00 or greater	10 days before 1 st payment

Procurement Plan

The purchaser will submit the agency Procurement Plan by the end of November annually using the most recent procurement plan template.

Vendor Performance

The purchaser will report vendor performance for purchases over \$25,000 from contracts administered by the CPA or any other purchase over \$25,000 made through delegated authority granted by CPA; purchases made other entities pursuant to Govt. Code Chapter 10, Subtitle D, or purchases exempt from CPA procurement rules and procedures.

Reports of problems and resolutions under any vendor contract are to be accurate, complete, and not subject to un-ethical influence.

The vendor has 30 calendar days to respond to the report if the vendor has received a score of a “C” or lower. Vendor responses are forwarded to the agency that initially submitted the vendor performance report for review. The SPD will work with the agency and vendor to achieve resolution for concerns raised. Once resolved, vendor and agency comments are added to the report. Both vendor and agency comments are limited to 4,000 characters. If more than 4,000 characters are submitted, the report will automatically truncate the remainder of the submitted comments.

The Comptroller reserves the right to eliminate any derogatory or otherwise inappropriate language from submitted comments. The Comptroller reserves the right to redact or modify personally identifying information submitted in vendor or agency comments.

TPPD Report

The purchaser will enter a monthly report of goods and services purchased from WorkQuest and any exceptions on the SmartBuy system.

HUB Reports

The purchaser will provide an annual HUB Report of supplemental data. This will include all non-Treasury payments to HUBs and Treasury payments made by credit card to HUBs. The report will compile data from bid tabs showing the numbers and types of HUBs and non-HUBs solicited during the reporting period.

The purchaser will provide HUB progress reports annually and semi-annually. The report will indicate the percentage of agency spending with HUBs compared with statewide goals. The purchaser will ensure that the current goals are used. Spending data will be obtained from the Treasury. The purchaser will contact the Treasury for a spending report for the appropriate reporting period.

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Treasury reports are cumulative. Expenditures are identified by type: heavy construction, building construction, special trades, professional services, other services, and commodities. TSBP primarily spends on professional services, other services, and commodities. Treasury reports do NOT include payments to other state agencies.

To calculate the percentage of HUB spending:

1. Create separate tabs for each spending category.
2. Remove all expenditures to WorkQuest (TIBH).
3. Remove all term contract expenditures (Marked as A or C).
4. Calculate the total issued to HUBs (Treasury reports include HUB categories).
5. Calculate the overall total.
6. Divide the total paid to HUBs by the overall total for the percentage of HUB spending.