



Texas State University Procurement & Strategic Sourcing

Procurement 101 Training



MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

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5 Pillars of Procurement & Strategic Sourcing



Procurement & Strategic Sourcing Leadership



Dan Alden

Director

and HUB Coordinator



Billy Becker

Associate Director

Purchasing,
eProcurement, and
Reporting.



Brenna Russell

Assistant Director

Contracts and Sourcing

OUR TEAM



ILONA RHYMER

CONTRACT SPECIALIST - ADMIN



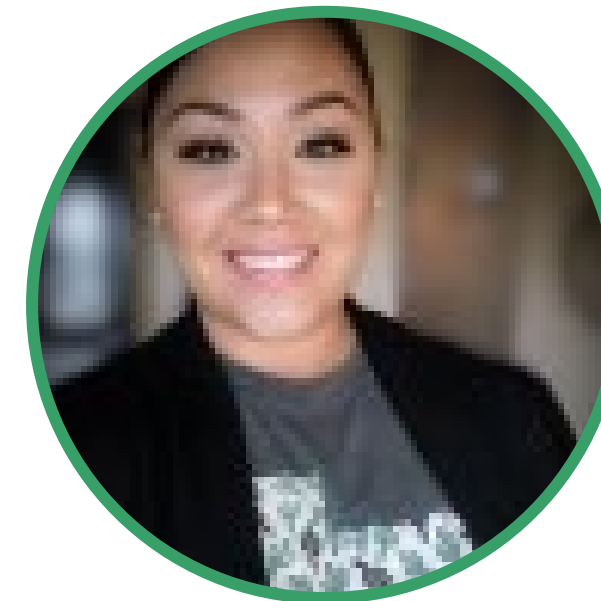
DEBORAH DELGADO

CONTRACT SPECIALIST - ACADEMIC



LISA LEOPOLD

BUYER III



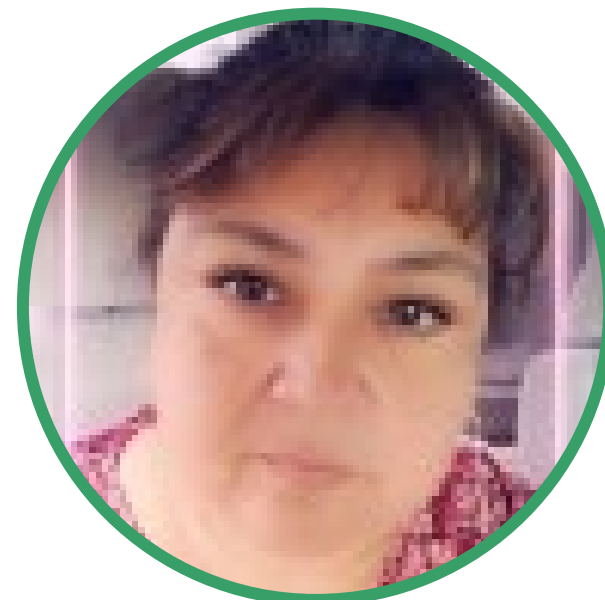
NICOLE MOSES

BUYER II - ADMIN



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P-CARD



LIN GACAYAN

VENDOR MANAGEMENT



ROSEMARY DECREE

HUB SPECIALIST



AVA BETTERS WORTH

ADMIN II



MILA DOIRON

ADMIN I

Training Objective – Financial Responsibility

The fundamentals of financial responsibility call for each employee to make a personal **commitment**.

1. To “**do the right thing**”
2. Make **decisions** that are just and right for the common good.

Purchasing and Contracts Overview

Financial management - Involves every employee because we are all responsible for:

1. protecting and conserving TXST resources
2. using these resources in a prudent manner for their designated purposes

By practicing good financial management - TXST and its employees become accountable to:

1. each other
2. our constituents
3. our regulatory bodies

Purchasing and Contracts Overview

We are governed by many Texas laws with respect to procurement including Government & Education Codes, Administrative Code and the General Appropriations Act.

TEC§51.9335(a): An institution of higher education may acquire goods or services by the method that provides the **best value** to the institution, including:

1. Competitive bids;
2. Competitive sealed proposals;
3. Catalog purchase (State of Texas contracts);
4. A group purchasing program (cooperative); or
5. An open market contract (<\$15k)

TAC§20.133: Only certified individuals may perform contract development activities or issue solicitations on the ESBD.

- UPDATED: Statewide Procurement Manual and Contract Management Guide - <https://comptroller.texas.gov/purchasing/publications/procurement-contract.php>
- Texas State University System (TSUS) Policies - <http://www.tsus.edu/about-tsus/policies.html>
- Texas State University Contract Management Handbook - <http://www.tsus.edu/offices/finance/procurement.html>

SPD Professional Certification and Training Program

The term “**public procurement professional**” refers to any agency employee that conducts Purchasing, Contract Development, or Contract Management activities. A description of the three procurement roles is summarized in the table below.

Procurement Roles	
Purchasing	The receipt and processing of requisitions, development of specifications, development of scope of work, the issuance of purchase orders against existing cooperative or agency contracts, and the verification of the inspection of merchandise or receipt of services by the agency. The term does not include the development of solicitations and contract awards that must be posted to the <i>Electronic State Business Daily</i> (ESBD) or in the <i>Texas Register</i> .
Contract Development	The term applies to actions taken prior to contract execution, including the receipt and processing of requisitions, assessment of need, development and review of specifications, development and review of scopes of work, identification and selection of procurement methods, identification and preparation of evaluation criteria, preparation and advertising of solicitation documents, tabulation of respondent bids, evaluation of respondent proposals, negotiation of proposals, and the preparation and completion of contract award documents. The term does not include invoice or audit functions.
Contract Management	The term applies to actions taken following contract execution, including the assessment of risk, verification of contractor performance, monitoring compliance with deliverable and reporting requirements, enforcement of contract terms, monitoring and reporting of vendor performance, and ensuring that contract performance and practices are consistent with applicable rules, laws and the <i>State of Texas Procurement and Contract Management Guide</i> .

All public procurement professionals, including those from agencies exempt from the purchasing authority of the Statewide Procurement Division (SPD), must **receive training and continuing education** to the extent required by SPD. An agency employee who is required to receive the training may not participate in purchases by the employing agency unless the employee has received the required training.

PROCUREMENT POLICY UPDATES

- Procurement Training and Certification Requirements (UPPS 05.02.05) – **POSTED**
 - Updated to follow State Comptroller requirements.
 - CTCD – Certified Texas Contract Developer (Contract Specialist) Institution employees must be certified as a Certified Texas Contract Developer to engage in contract development functions if the **employee develops, evaluates, negotiates, or awards** a contract posted to the Electronic State Business Daily or in the Texas Register.
 - CTCM – Certified Texas Contract Manager (Department Stakeholder(s)) Institution employees must be certified as a Certified Texas Contract Manager to engage in contract management functions on behalf of the Institution if the **employee has the job title of “contract manager” or “contract administration” manager” or “contract technician” or “contract specialist”; performs contract management activities as fifty percent (50%) or more of their job activities; or manages any contract in excess of \$5,000,000.**
 - Basic Purchaser Course – Per TSUS CMHB 1.4.2 Institution employees must complete the Comptrollers’ Basic Texas Purchaser Course to engage in purchasing functions if the employee has the job title of “purchaser”; performs purchasing activities as **fifteen percent (15%)** or more of their job activities; or makes a purchase **in excess of \$5,000.**

To register for CTCD, CTCM, and/or BTP courses go to the Statewide Procurement Education System (link [here](#))

CTCD – Location Austin, fee \$435, 24 credit hours, check for next course, link [here](#).

CTCM – Location Austin, fee \$435, 16 credit hours, check for next course, link [here](#).

Basic Texas Purchaser Certification – Virtual Course (link [here](#)), fee \$100, 8 credit hours, check for next course.

Purchasing and Contracts Overview - Ethics

Maintain high ethical standards as stewards of public monies. Conduct must not create a conflict of interest.

- Equal opportunity to all qualified and reputable vendors
- No benefits / gifts for performing official duties or that may result in an obligation
- No misuse of information
- No self-dealing
- No workarounds for policy (e.g., splitting orders to get under thresholds)
- Vendor ethics - pressure or bullying tactics to fulfill sales quotas

It is imperative to follow all state policy, rules, and regulations when working in a procurement role.

If it feels wrong, it probably is wrong.

Actions and communications must be free from perception of impropriety

The Texas State University System Conflict of Interest Policy and Code of Ethics are established within TSUS Rules and Regulations located at <https://www.tsus.edu/about-tsus/policies.html>

Texas State University Ethics for Faculty and Staff are established with TXST UPPS <https://policies.txst.edu/university-policies/01-04-02.html>

What Is a Conflict of Interest?

Public procurement professionals are the gatekeepers for the proper expenditure of the government's limited financial resources. They are entrusted to uphold the highest ethical standards and be good stewards of public funds with every purchasing decision they make.

When an individual's official duties clash with the individual's personal interest, a "conflict of interest" may occur; this conflict may impair one's judgement when trying to determine the proper course of action.

How to avoid Conflicts of Interest

It is imperative when a procurement official encounters a conflict of interest that they:

Avoid: Situations that may result in a conflict of interest or nepotism.

Disclose: Information about the conflict of interest, who the person is, or the financial benefit that can be reasonably foreseen.

Recuse: Most likely if a conflict of interest is substantial the procurement professional will remove themselves from the procurement.

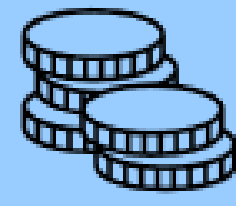
How to avoid Conflicts of Interest

- If in doubt—consult your management or ethics office: An appearance of impropriety may make you look bad, but bribery could have potential legal consequences.
- Remember a bribe impropriety, have a "transaction" between two parties in which both party benefit.
- With an appearance of impropriety we must be mindful of how we are 'perceived' when interacting with the vendor community
- Procurement professionals should always strive to avoid even the appearance of impropriety as it can result in the perception of favoritism from an agency representative towards a specific vendor or contractor. On the other hand bribery, including accepting or offering bribes, can have serious legal ramifications and must be avoided at all times.

Violating State Standards- Ethics

Consequences for violating state standards may include:

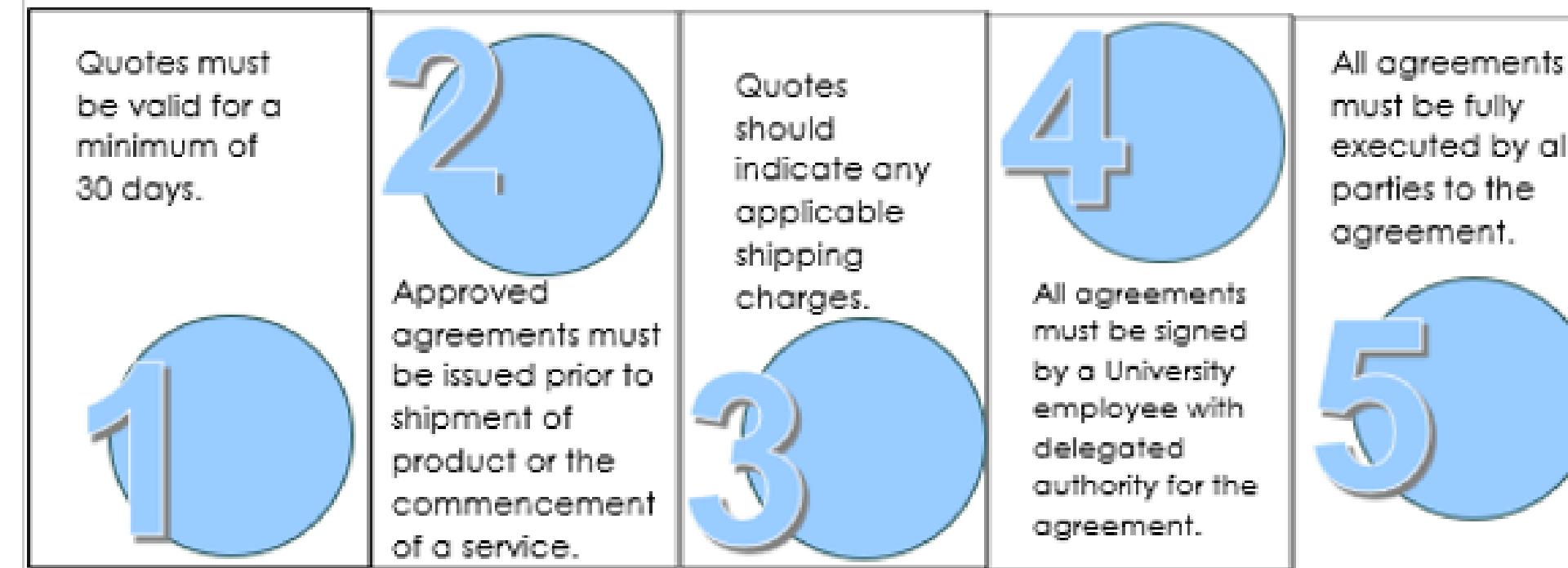
- 1 Termination of employment
- 2 Employment-related sanctions
- 3 Any applicable civil or criminal penalties



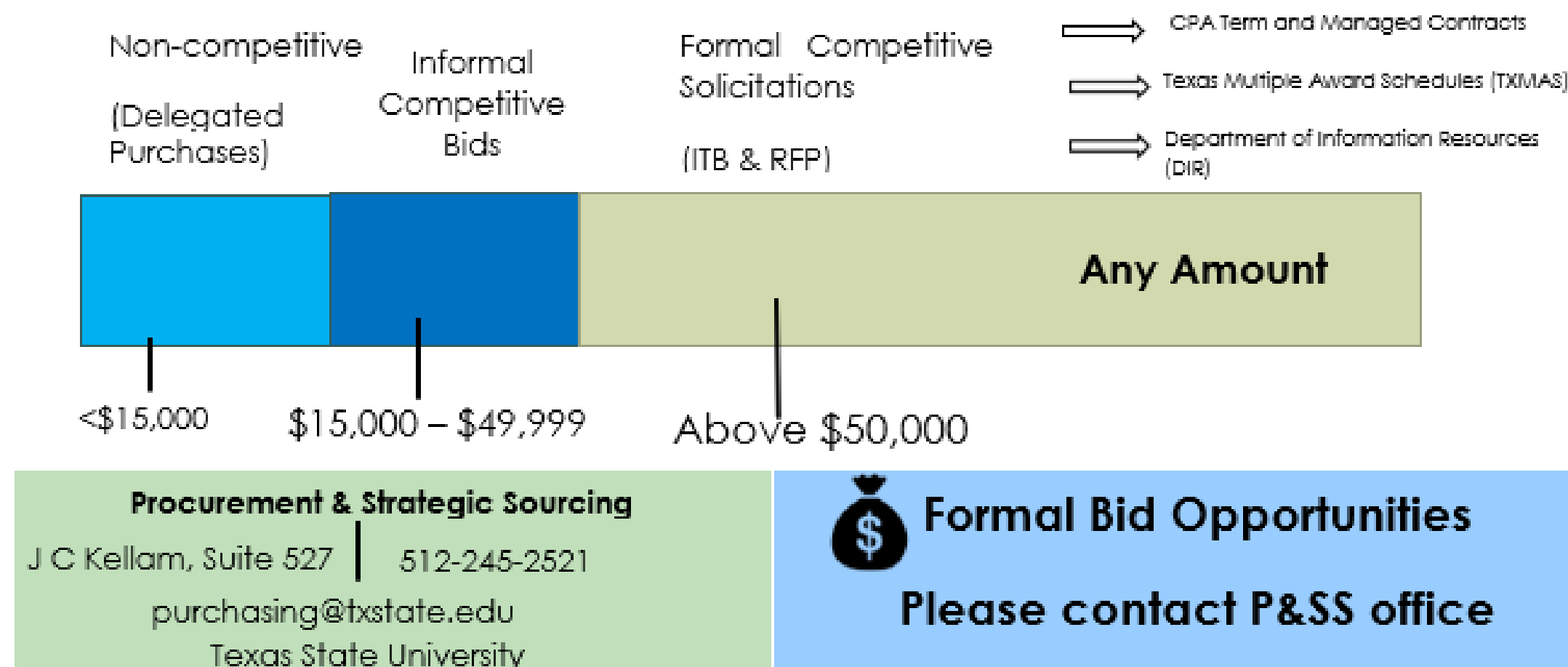
To expedite purchasing functions, **university business officers** are authorized by the university to approve small purchase orders (delegated purchases) less than.

\$15,000

THINGS TO KNOW...



Solicitation Process



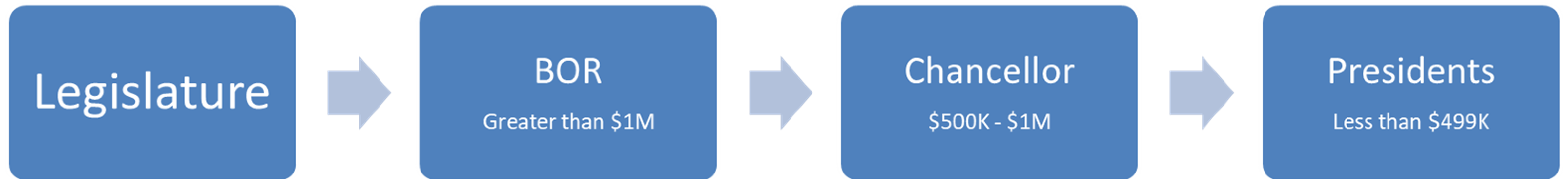
For helpful resource documents visit the P&SS website “Forms” to view.

CONTRACT MANAGEMENT–CONTRACT AUTHORITY

- Texas State is **not bound** by a contract, purchase, or agreement *signed by an unauthorized person* on behalf of the university. TXST may hold the person who signed without proper authorization **personally liable** for any damages resulting from its repudiation. UPPS 03.04.02
- **Only authorized TXST representative** may enter into certain contracts, purchases, or agreements on behalf of Texas State (see UPPS No. 03.04.02, Contracting Authority). “The president has authority to enter into contracts on behalf of the university provided that the contract does not require approval from the Chancellor or The Texas State University System (TSUS) Board of Regents”.

Contract and Purchasing Authority

The authority to obligate the institution (“signature authority”) is passed down from the legislature:





CONTRACT MANAGEMENT

TXST is committed to executing contracts in compliance with applicable law and TSUS Rules and Regulations

- All Contracts/Agreements and/or quotes with terms and conditions are required to be entered into TSUS Marketplace Contracts+ (TCM). This serves as the central contract repository and system of record for all TXST.
- Contract Request – Submit via TSUS Marketplace Contacts Request.
 - [How to Create and Submit a Contract Request](#)
- All contracts require review **prior** to approval. Contract review may include Information Technology and OGC review.
- Contract Manager (Department Stakeholder) performs contract monitoring per TXST Contract Management Procedure located at https://www.txst.edu/procurement/contracts/routine_contract_monitoring.html.
- Contract Term and Renewals – Notify Contract office a minimum of **60 days prior** to renewal
- **Do not exceed contract amount** - Maximum Contract Amount, increases may require additional approval or an amendment.

Contracts Updates & Reminders

- Contract Monitoring & Responsibilities
 - Risk Assessment – Required at \$500k
 - Enhanced Contract Monitoring – Required with a risk score of 26 and higher or at >\$1M
 - FS-07 Contract Close-out – Required on all contracts \$250k and greater
- Resources
 - TXST Guidelines Summary
 - TXST Required Forms Per Procurement
- Contract Flow Charts - <100k (1-2 weeks); \$100k - \$499k (min 4 weeks); >\$500k (min 11 weeks)



Purchasing and Contracts Overview – GPO Contracts

Texas Institutions of Higher Education Commonly Use Existing Contracts From the following Group Purchase Organizations (GPO)

BuyBoard/Texas Association of School Boards (TASB)	Choice Partners
Educational & Institutional Cooperative Purchasing (E&I)	Education Service Centers – Various Regions
National Cooperative Purchasing Alliance (NCPA)	Houston – Galveston Area Council (HGACBuy)
OMNIA Partners (formerly National IPA/USA Communities)	Provista
The Interlocal Purchasing System (TIPS)	Sourcewell
The Purchasing Association of Cooperative Entities (PACE)	UT System Supply Chain Alliance (Alliance)

* To search vendor cooperative agreements, sign up for free access to Pavillion at Website: www.withpavilion.com Email: hello@withpavilion.com



Purchasing and Contracts - State Contracts

State of Texas Contracts

- **Department of Information Resources (DIR)** <http://dir.texas.gov/> software, hardware, and telecommunications
- **TXSmartBuy** <http://www.txsmartbuy.com/> various goods and services including “green items” – recycled, remanufactured or environmentally sensitive items available for purchase
- **Texas Multiple Award Schedule (TXMAS)**
<http://comptroller.texas.gov/procurement/prog/txmas/> various goods and services

Purchasing Overview - Guidelines Summary

Dollar Range		Solicitation Method
\$0	<\$15,000	Open Market: Competitive quotes are encouraged, but not required. A purchase order can be issued after a written quote is solicited from a single source. <u>A good faith effort should be made to include quotes from a certified Texas HUB vendor.</u>
≥\$15,000	<\$50,000	Informal Bid: A minimum of three written quotes are required. <u>A good faith effort must be made to include quotes from certified Texas HUB vendor.</u> Award is generally based on cost & delivery. Non-competitive methods may also be used, if appropriate.
≥\$50,000	+	Formal Bid: A competitive solicitation may be required. <u>A good faith effort must be made to include quotes from certified Texas HUB vendor.</u> Non-competitive methods may also be used, if appropriate.

- The solicitation method is generally determined by the estimated TOTAL dollar value of the product or services being purchased for **the life of the contract.**
- Note: The utilization of **existing contracts** that have been competitively awarded eliminates the need for bidding at the institution level.

TXST Guidelines Summary

For Purchases of Goods & Service

Contract/PO Amount	Procurement Method	Delegated Signature Authority	Reporting Requirements ⁱ
<\$15, 000	Open Market Purchase <ul style="list-style-type: none">• TSUS Marketplace: TSUS Marketplace User Guide• Co-op's: Group & Cooperative Purchasing *• State of Texas Contracts**• One (1) Written Quote – create REQ in TCM or SAP (Reg to Check User Guide)	Director of P&SS Office	SB20
\$15,000 - \$50,000	Informal Bid <ul style="list-style-type: none">• Submit a minimum (3) quotes total, of which (2) must be <i>HUB vendors</i>ⁱⁱ• Proprietary Justification Form (Used when the purchase is limited to only one brand, manufacturer, vendor, or provider) –Form Instructions	Director of P&SS Office	SB20
\$50,000.01 - \$499,999	GPO/Co-op's, State Contracts, Formal Bid-RFP/Solicitations ***	List of Approvals & Signature Authority	SB20 & LBB
\$500,000 - \$999,999	GPO/Co-op's, State Contracts, Formal Bid-RFP/Solicitations ***	List of Approvals & Signature Authority -Chancellor's Approval Required	SB20 & LBB
\$1,000,000 or greater	GPO/Co-op's, State Contracts, Formal Bid-RFP/Solicitations ***	List of Approvals & Signature Authority - Board of Regents Approval Required (Quarterly Meetings)	SB20 & LBB

*GPO/Co-op's (approved for use):

[BuyBoard](#) (login required)
[Choice Partners](#) (login required)
[Educational & Institutional Cooperative Services\(E&I\)](#)
[First Choice](#)
[GoodBuy](#)
[GSA](#)

[OMNIA PARTNERS](#)
[Provista](#) (login required)
[SourceWell](#)
[TIPS/TAPS](#)
[TPASS](#)
[UT Supply Chain Alliance](#)

**State Contracts:

[TxSmartBuy Contract Index](#)
[Texas Multiple Contract Index](#) (TXMAS)
[Department of Information Resources](#) (DIR)
Note: Please contact Purchasing@txstate.edu for the websites that require a login as identified above.

Additional Helpful Resources: General [Purchasing Forms](#) & [Contract Forms](#)
[TXST Procurement Procedures Handbook](#)
[TSUS Contract Management Handbook](#)

***ALL Formal Bids & RFP/Solicitations should be submitted to purchasing@txstate.edu.

Proprietary Justification (as defined in [Texas Education Code 51.9335 b](#)) is used when specifications or conditions of the proposed procurement do not permit an equivalent product or service to be supplied. **ONLY USE** after all other procurement methods, including *Marketplace punchouts, GPO/Co-op's/Piggybacks, State Contracts* have proved unsuccessful.

1. **Competitive:** The specified product or service is available for purchase through more than one vendor e.g., dealers, distributors, resellers, authorized service providers, etc.
2. **Sole Source:** The specified product or service is only available for purchase through a single vendor e.g., manufacturer, publisher, service provider, software developer, etc.

ⁱ [LBB Compliance Form](#) and [SB20 Requisition Documents](#)

ⁱⁱ **Processing Guidelines for Informal Bids – Purchase Value of \$15,000 - \$50,000**(The bidding opportunity is not required to be publicly posted)
-Departments shall solicit a minimum of three quotes from vendors on the Comptrollers [Centralized Masters Business List \(CMBL\)](#), with **at least two (2)** being Texas Certified *HUB* suppliers from the [CMBL](#). ([How to Search CMBL](#)). You can add additional vendors on the CMBL, if necessary. For assistance in searching the CMBL, please contact the *HUB Specialist* at HUB@txstate.edu or 512.245.2521.
-Vendors may submit their quotes to departments via mail, email, or fax.
-The P&SS Office may solicit additional bids if it determines that there are University preferred vendors capable of providing the goods or service.
Procedure: Use this [Bid Tab Template](#) to solicit vendors, see also: [Department's Guide and Checklist for Informal Bids](#)

Required Forms/Procurement Thresholds	FS-07 – Contract Close-Out Form (required in TCM)	HUB Determination Form (HDF)	Informal Bid Template	Proprietary Justification Form (Required for Proprietary or Sole Source Procurements only)	SB20 Documents (attach in requisition)	Vendor Setup in PaymentWorks/SAP	FS-01 – Risk Assessment Form (Processed by P&SS, Facilities, FPDC, VPIT, ALERRT)	FS-02 – Enhanced Contract Monitoring (Processed by P&SS, Facilities, FPDC, VPIT, ALERRT)	1295 (Processed by P&SS, Facilities, FPDC, VPIT, ALERRT)
<\$15,000						✓			
\$15,000 - \$50,000			✓	✓	✓	✓			
\$50,000 or greater				✓	✓	✓			
\$100,000 or greater		✓		✓	✓	✓			
\$250,000 to \$499,999	✓	✓		✓	✓	✓			
\$500,000 to \$999,999	✓	✓		✓	✓	✓	✓		
\$1,000,000 or greater	✓	✓		✓	✓	✓	✓	✓	✓

Forms shaded in gray will be completed by the P&SS Office, Facilities, FPDC, VPIT and ALERRT

TXST Required Forms per Procurement

Purchasing Overview

For each purchase you initiate, authorize, or process ask yourself the following questions:

1. Does the purchase comply with all applicable TXST policies?
2. Does this purchase violate any applicable Conflict of Interest policy or law?
3. Could this purchase negatively impact the financial health or reputation of TXST?
4. Does this purchase have proper authorization?
5. Is there source documentation (e.g., quote, contract, etc.) to support this purchase?
6. Are adequate funds available to support this transaction?

Purchasing Overview

Employees are not authorized to make purchases which obligate Texas State University without first obtaining a purchase order.

- Purchase orders are not intended to be used strictly as a payment tool; it also includes TXST T&C's.
- The purchase order should be created prior to the commitment or obligation.
- Purchase orders submitted after the commitment has been made or after the goods and services are received are considered “after the fact” and require proper justification for the eNPO.
- If there is a contract in place for the goods or services an eNPO will not be accepted and a PO should be submitted.

Purchasing Overview – Proprietary Justification

Defined in SPD rules (34 TAC §20.25(b)(44)):

- Products or services manufactured or offered under exclusive rights of ownership, including rights under patent, copyright, or trade secret law.
- A product or service is proprietary if it has a distinctive feature or characteristic which is not shared or provided by competing or similar products or services.
- Submit Proprietary Justification Form to Procurement Office for review and approval for purchases >\$15,000 of goods or services.

Purchasing Overview – Emergency Justification

1. Defined in Texas Administrative Code Title 34, Part 1, Chapter 20.
2. Requires a written justification submitted to P&SS.
 - Submit a TXST Emergency Purchase Justification Form for purchases >\$15,000.
3. Emergency purchases should be made as competitively as possible.
4. The emergency purchase of goods or services should not exceed the scope or duration of the emergency.

Purchasing Updates & Reminders

- SB20 docs note the Vendor hold for Marketplace and SAP are now system driven and not required to be attached.
- EHSREM material group and workflow approval
- TXST Required Forms per Procurement: https://www.txst.edu/procurement/contracts/contract_forms.html
- FS-06 Form required for all individuals, DBAs, and LLCs. Non-single member LLCs are only required to acknowledge section 1 and 6. Single member LLCs are required to complete the whole form. The FS-06 must be completed, signed, and approved prior to issuing a REQ or eNPO.
- Amazon – Use Firefox
- Always use TSUS Marketplace for purchases using an existing contract. TSUS Marketplace purchasing is preferred over SAP
- Requisition Workflow status is available to track in both TSUS Marketplace and SAP (video available).
- State Use Program workflow

State Use Program

- State Use Program (SAO Audit finding) – “The University Should Strengthen Its Purchasing Processes to Ensure That It Complies with State Use Program Requirements”.
 - State Use Program Requirements - Texas Human Resources Code, Section 122.0095, requires each state entity that purchases products or services to
 1. designate an employee to ensure that it complies with all requirements and
 2. report to the Comptroller’s Office and the Texas Workforce Commission when products or services are available through TIBH Industries but are purchased from a different vendor.
 - State statute requires state agencies and institutions to purchase from the State Use Program unless the needed product or service meet certain exceptions. Agencies and higher education institutions are also required to report the purchase of products or services available from an organization eligible under the State Use Program but purchased from a business outside the State Use Program, including the cost paid and reasons for not purchasing from the State Use Program.
 - Classifications of acceptable exceptions include:
 - The product or service available does not meet the reasonable requirements of the agency or institution. This may include an inability to meet product specifications or to deliver the needed product within a certain period of time.
 - The inability to provide temporary services within certain regions of the state.
- WorkQuest Punchout

WorkQuest

PROCUREMENT POLICY UPDATES

- Update of policy for Purchases of Awards (**UPPS 03.01.03**) – **POSTED**
 - Removed requirement for PCard waiver and FS-08
 - Interagency or Interlocal Cooperation Contract or Agreements (**UPPS 03.04.07**) – **DELETED**
- Contracts and Agreements New Policy (UPPS 03.04.10) – **POSTED**
 - Ensure contracts and agreements are prepared according to Federal, State and Local laws/rules/regulations.
 - All contracts to be submitted in TSUS Marketplace and reviewed by P&&SS.
 - Only authorized representatives may enter into contract.
 - TXST not bound if signed by an unauthorized person on behalf of TXST.
 - Hiring independent contractors who would otherwise be an employee.
- Vendor Maintenance (FSS-PPS 03.13) – Now UPPS 05.02.07 Vendor Management - **POSTED**
 - Change from division policy to university policy.
 - Added requirement for all vendors updates to be made via PaymentWorks.
 - Removed definitions and procedures.

PROCUREMENT POLICY UPDATES

- Procurement Policy (**UPPS 05.02.02**) – **POSTED**
 - Added open market for a procurement method for purchases <\$15k.
 - Updated list of exempt purchases to follow TSUS rules. Includes the following additions:
 - subscriptions; allowable membership fees; training or conference registration fees; allowable accreditation or professional license fees;
 - catering, meals, and food services (not food for resale)
 - games, tournaments, or related sporting events;
 - freight and postal services
 - purchase of original existing artwork; loaned art; artifacts; museum or art exhibits
 - Commissioned artists or musicians; entertainers; theater groups; performers; or speakers. Individuals will require FS-06 to confirm they are not a TXST employee.
 - Internal Repair

PROCUREMENT FORM UPDATES

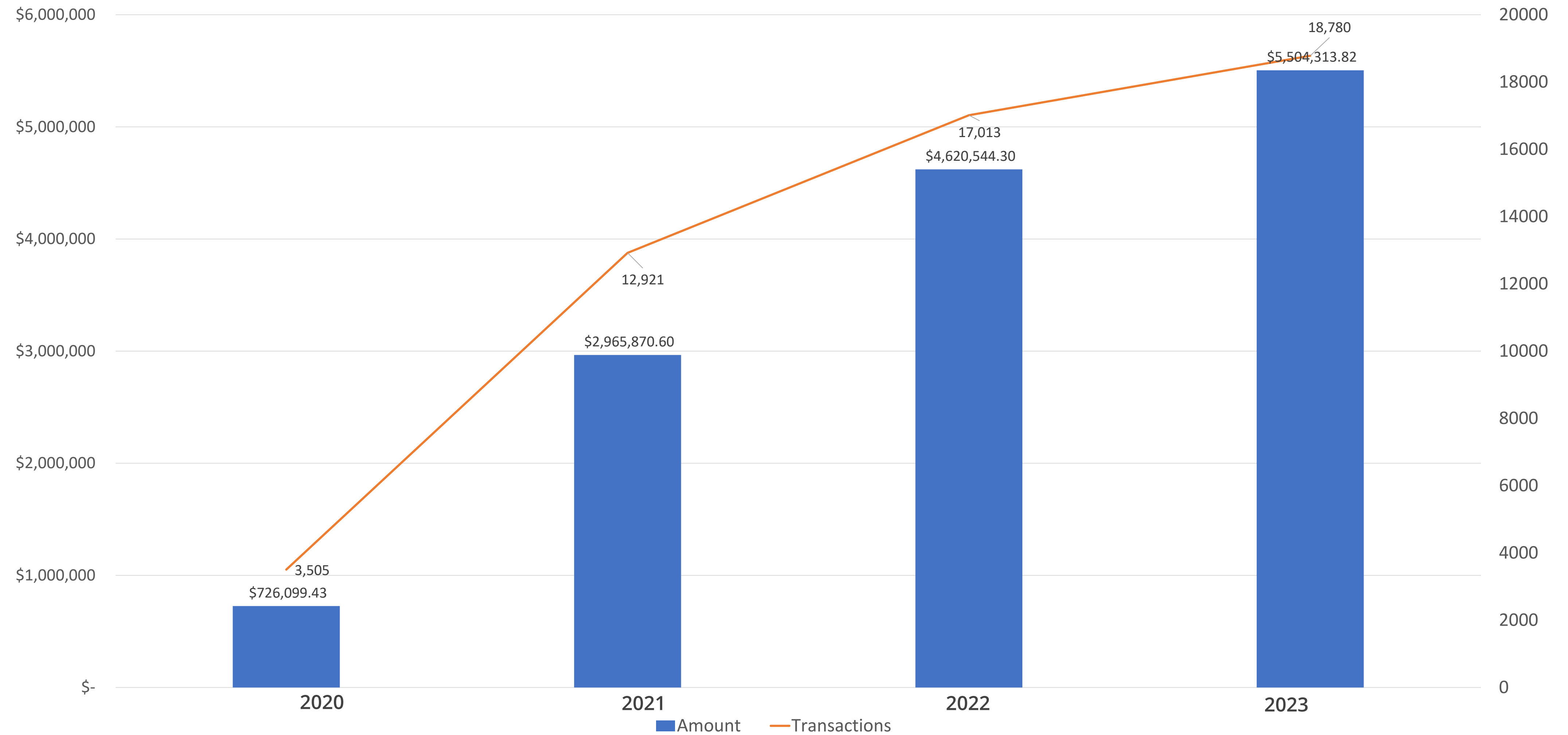
- FS-01 & FS-02 – Risk and Enhanced Contract Monitoring Forms have been **combined**.
- FS-05 – Exception to policy, available on P&SS website. **Replaces AP-12**
- FS-08 – Request to purchase alcohol, available on P&SS website. **Replaces AP-12**
- HUB Determination Form (HDF) increased from \$90k to \$100k

Note: **Ensure that forms are accessed via the P&SS website.** Do not download or access forms via stale searches from TXST website.

P C a r d P r o g r a m

- Updated Procurement Card Guidelines and Procedure Manual and New Pcard Forms located in the Pcard website, they are to be used as of February 1, 2025.
- Monthly logs/Citi statements: [Video](#), [PDF instructions](#)
- Reminder to have all your reallocations completed prior to schedule dates set for posting
- Prohibited items – Alcohol, Gift Cards, Animals, Fuel, Phone Services, Travel, Weapons, Flowers and other
 - Flowers, Floral Arrangements or Plants can only be purchased for official University Events and required FS-05
- Waivers are no longer required for Awards, Catering, Meal, and Food Services (not food for resale). Waiver are still required for increases and restricted purchases
- New Method for Vendor Holds – verify that the vendor is not on hold for all purchases over \$500 is being done through SAP. Training guide and video located on Pcard website
- Questions? Please contact p_card@txstate.edu See resources available at:
<https://www.txstate.edu/procurement/howtopurchase/procurementcard.html>

P Card Growth



Vendor Management

Vendor Management policy requirements can be located at [UPPS 05.02.07](#)

New Vendor Registration via PaymentWorks



1. Send vendor registration invite via PaymentWorks to the vendor. Instruction [here](#).
2. New vendor registration and changes to vendor records in TXST SAP (system of record) are required to be setup via PaymentWorks.
3. Vendor Management will approve vendor registration. Contact vendorrequests@txstate.edu for any questions or support. Note: foreign vendor registrations have multiple approvers before vendor management.
4. Department can search and track vendor registration via PaymentWorks. Instructions [here](#).

Vendor Management

FS-06 – For Individuals only

- The FS-06 form is used to determine if the contractor is currently or has been employed at TXST within the past 12 months
- Employees cannot be set up as vendors, they must be paid by PCR or stipend.
- Exceptions for this include: eNPO reimbursement for employees for certain items (registrations, seminars, work boots, etc.) paid on their employee number, not a vendor number.
- All sections need to be completed, including Account Manager and Contractor signatures before submitting.
- FS-06 needs to be sent to purchasing@txstate.edu (As an attachement)
- FS-06 should be fully approved by Vendor Requests before creating a Requisition/eNPO or TCM Form Request.
- Approved forms will be returned to department contact listed on Section I. Be sure to include your name and net id.
- If setting up new vendor, send FS-06 in once their registration is completed through PaymentWorks and/or in SAP.

Vendor Management

Vendor Hold Search: ZHOLDCHK

- The new process for checking to see if a vendor is on hold is done through SAP using the T-code ZHOLDCHK
- Required for any Pcard purchase \$500 or greater.
- A screenshot of the report is required to be attached to the monthly statement for any purchases \$500 or greater.
- The hold search is no longer required for SB20 documents as vendors in SAP and TCM are blocked for payment purposes.
- Please note you will still be able to create POs for these vendors; however, the payment will go to the State until the vendor resolves its issue with the State.
- More information can be found [here](#).

Executive Order No. GA – 48

- Executive Order No. GA-48, issued by Texas Governor Greg Abbott on November 19, 2024, aims to "harden" state government operations against foreign adversaries. The order specifically targets entities from countries identified by the U.S. Department of Commerce as posing national security risks. These countries include China (including Hong Kong), North Korea, Iran, Cuba, Russia, and Venezuela under Nicolás Maduro's regime .
- This executive order is part of a broader initiative to safeguard Texas's critical infrastructure and intellectual property from foreign influence and potential espionage. State agencies and public universities (including TXST) are actively implementing policies to comply with these directives.

Executive Order No. GA – 48

“A covered agency or public institution of higher education cannot enter into a new contract, contract extension, or contract renewal for a good or service with any company that meets any of the above-listed criteria. However, if the agency or public institution of higher education can sufficiently demonstrate that (a) the good or service is necessary for the covered agency or institution of higher education to fulfill a core function that directly benefits Texans and (b) the good or service can only be provided by an entity that meets one of the above-listed criteria, then the covered agency or public institution of higher education may enter into a new contract, contract renewal, or contract extension with such an entity for no more than one year from the date of the issuance of this order, and never thereafter.” – [Executive Order No. GA-48](#).

Executive Order No. GA – 48

1. Restrictions on Gifts and Travel

- State employees and public university personnel are prohibited from accepting gifts of any value from entities associated with the listed countries.
- Professional travel to these countries is banned.
- Personal travel to these countries requires prior notification to the institution and a post-travel report detailing the trip's purpose and dates .

Executive Order No. GA – 48

2. Employment and Contractual Measures

- Job descriptions for positions involving critical infrastructure must include a requirement to maintain the security or integrity of that infrastructure.
- State agencies and public universities are restricted from entering into contracts with entities linked to the listed countries, including those identified in Sections 889 and 1260H of the National Defense Authorization Act .

Executive Order No. GA – 48

3. Compliance and Reporting

- Affected institutions must certify compliance with the order to the Governor's Office annually by September 1.
- Universities are implementing internal measures, such as blocking access to certain applications and services associated with the listed countries, to ensure adherence to the order .

Executive Order No. GA – 48

4. Foreign Talent Programs

- Participation in foreign talent programs sponsored by the listed countries is prohibited for state employees and public university personnel

Vendor Management

- Email vendorrequests@txstate.edu with PATS as the subject line with the vendor number to add vendors to TCM.
- Blocked vendors- reach out to determine why or if they can be unblocked.
- If a vendor is requesting TXST complete a vendor profile, direct them to me.

HUB Program Review

Historically Underutilized Business (HUB):

- Small business (per TAC) with principal place of business in Texas
- 51% or more owned by:
- Owner must reside in Texas and actively participate in daily operations
- Must be certified by the state

The Statewide Procurement Division, Historically Underutilized Business (HUB) Program administers the HUB program in accordance with:

- Texas Government Code Title 10, Subtitle D, Chapter 2161 & Texas Administrative Code, Title 34, Part 1, Chapter 20, Subchapter D, Division 1, Rule §20.281 – 20.298

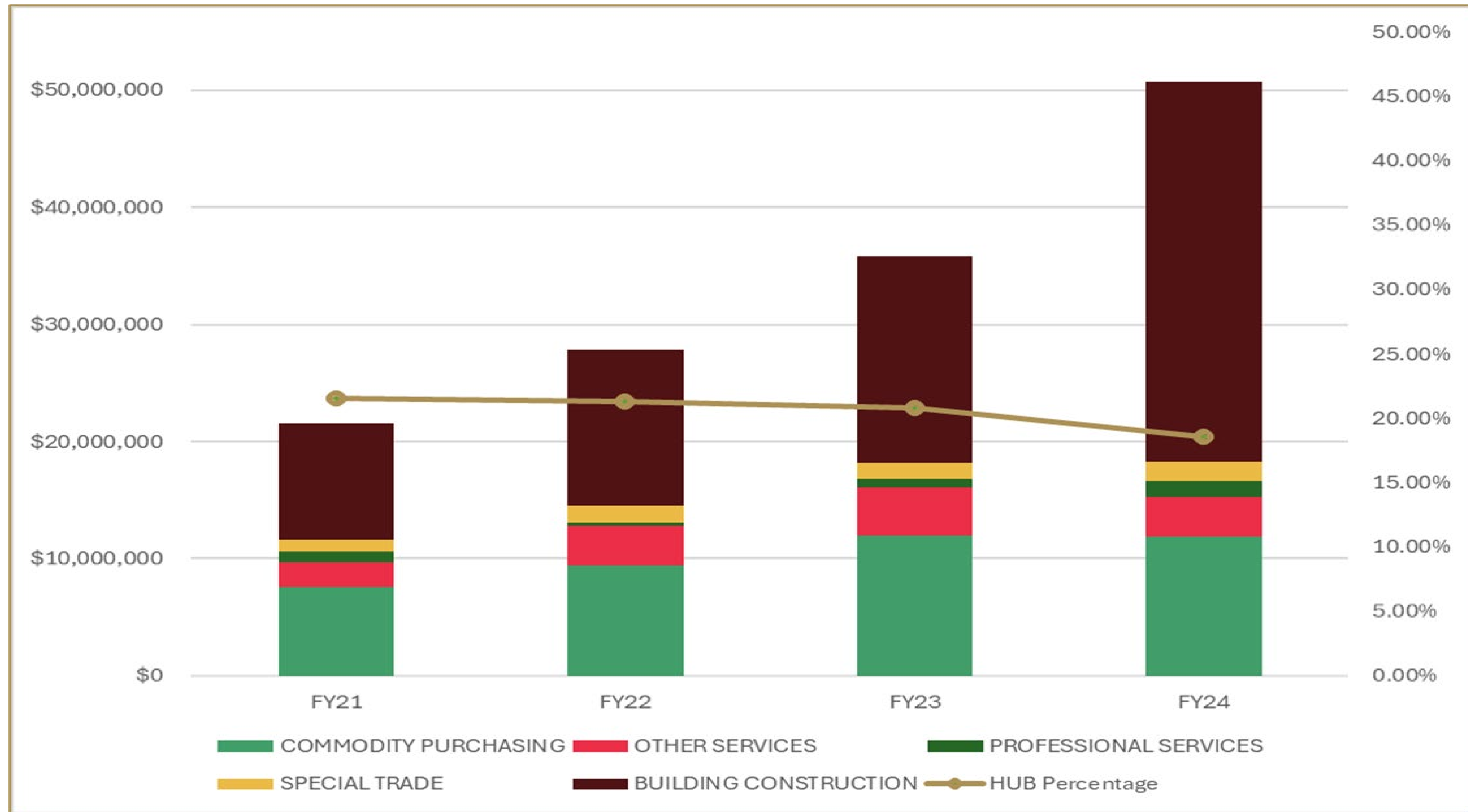
State of Texas HUB goals

State agencies shall make a good faith effort to assist HUBs in receiving a portion of contracts.

Texas State University has adopted the State of Texas HUB goals as follows:

- 21.1% Building Construction
- 32.9% Special Trade
- 23.7% Professional Services (engineering, architecture, etc.)
- 26.0% Other Services
- 21.1% Commodities

Total Annual HUB Spend and HUB%





TEXAS  STATE
UNIVERSITY[®]

PROCUREMENT TRAINING AVAILABLE

- P&SS has created training resources for new Administrative Assistants / Buyers plus anyone who enters requisitions on our website. Please review these prior to calling P&SS office, this will help us to better support you. See videos and PDF instructions here: <https://www.txst.edu/procurement/resources/training.html>
- **Business Process Certification (BPC)** – Success Factors Learning
 - Getting Started with SAP Business Client – This course prepares staff for advanced tasks using the SAP Business Client. Typically, employees who benefit from this course hold SAP roles such as the Supervisor, Time Administrator, Department Head, Budget, or Requisitioner – to name a few.
 - Who Should Attend: All new hires required to perform duties beyond time keeping using the SAP Business Client.
 - PCard Certification Online Course – All PCard users and custodians should complete annually.
 - TSUS Marketplace
 - PaymentWorks
 - TSUS Marketplace Contracts Plus (aka TCM)
 - SAP Requisition to Check (Req to Check)

RSS Feeds & Contacts

- Stay informed on process and form changes.
- Please see below for RSS Feed setup instructions:

[How to Add RSS Feed for Purchasing](#)

Procurement & Strategic Sourcing

512-245-2521

purchasing@txstate.edu

contracts@txstate.edu

p_card@txstate.edu

vendorrequests@txstate.edu

HUB@txstate.edu

Thank you for coming!

