



Texas State University Procurement & Strategic Sourcing

Procurement 101 Training – Foundations of Public Procurement



MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

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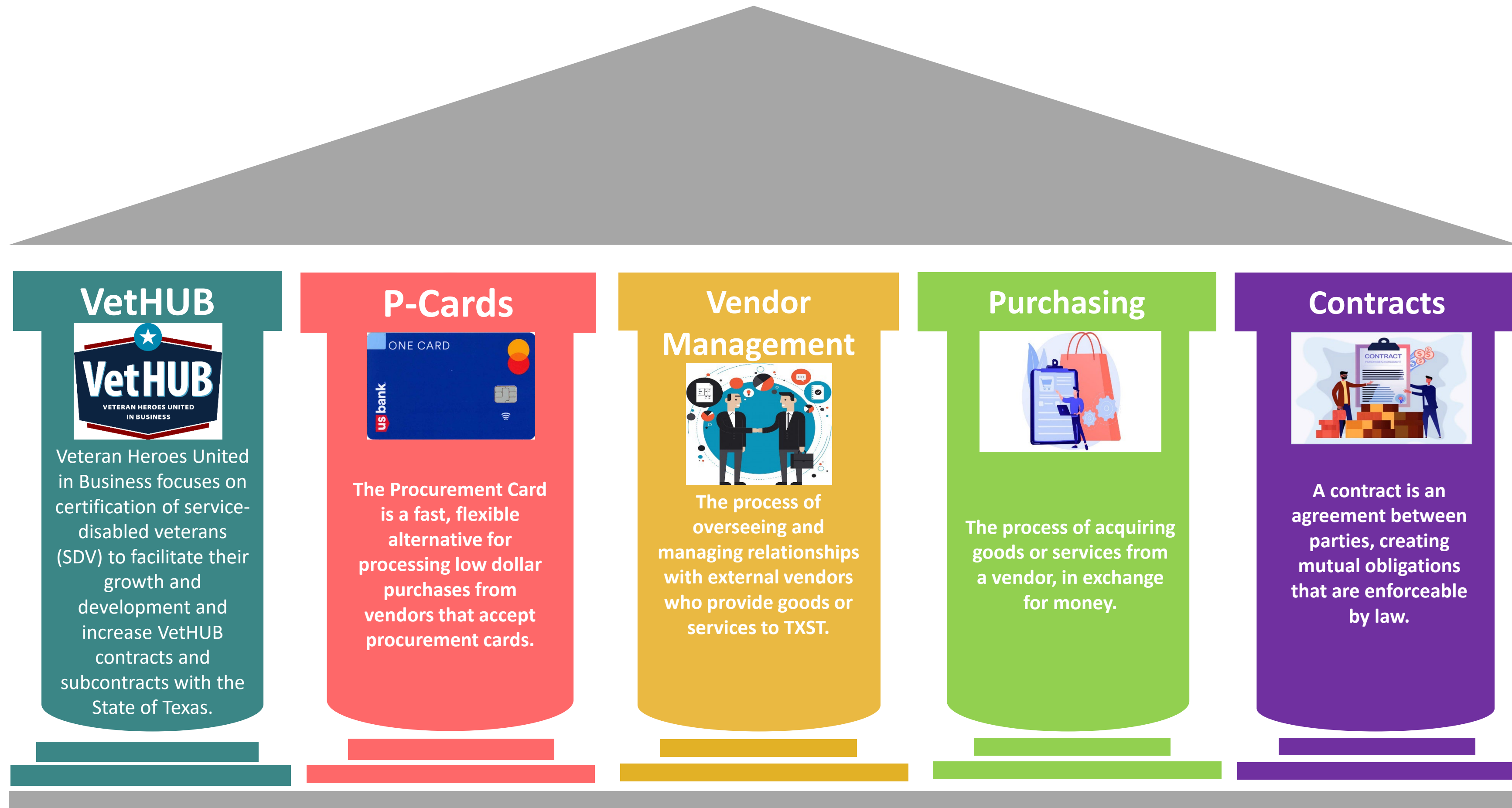
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5 Pillars of Procurement & Strategic Sourcing



Procurement & Strategic Sourcing Leadership



Dan Alden

Director

and HUB Coordinator



Brenna Russell

Associate Director

Contracts and Sourcing



Kevin Kolb

Assistant Director

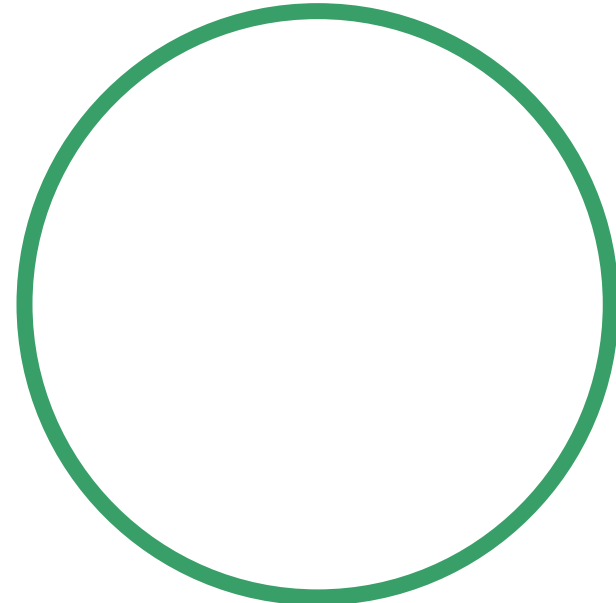
Purchasing, eProcurement,
and Reporting.

OUR TEAM



ILONA RHYMER

CONTRACT SPECIALIST - ADMIN



VACANT

CONTRACT SPECIALIST - ACADEMIC



ZACH FARNSWORTH

CONTRACT SPECIALIST



EMILY MCKENZIE

BUYER III



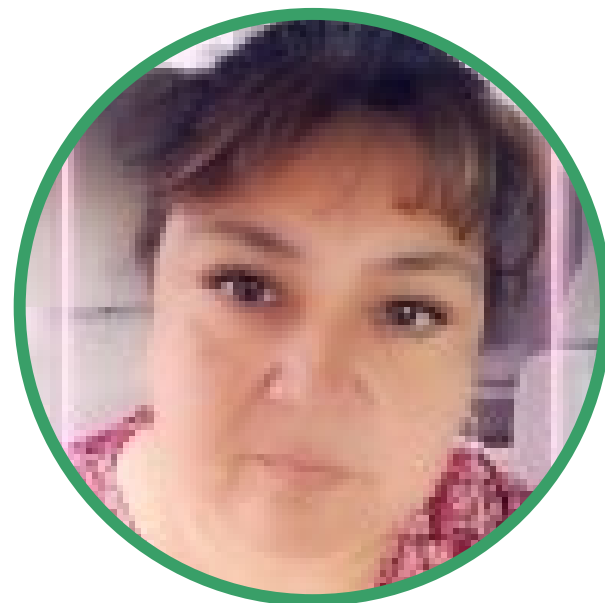
AVA BETTERSWORTH

BUYER II - ADMIN



ROSEMARY DECREE

BUYER II - ACADEMIC



CYNTHIA BALBOA

P-CARD



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VENDOR MANAGEMENT



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PROCUREMENT SPECIALIST



MILA DOIRON

ADMIN II



MATHEW VILLASEÑOR

ADMIN I

Training Objective – Financial Responsibility

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 several 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. Catalog purchase (State of Texas contracts);
3. A group purchasing program (cooperative); or
4. An open market contract (<\$50k)

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

- 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>

Procurement Ecosystem



Texas Administrative Code (TAC§20.133) mandates that only certified individuals may perform contract development activities.

PROCUREMENT POLICY UPPS 05.02.05

Procurement Training & Certification Requirements - Updated to align with Texas Comptroller and TSUS requirements.

- **CTCD – Certified Texas Contract Developer:** Employees who develop, evaluate, negotiate, or award contracts that are posted to the Electronic State Business Daily (ESBD).
- **CTCM – Certified Texas Contract Manager:** 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 Texas Purchaser Course (BTPC):** Required under **TSUS CMHB 1.4.2** for employees who have purchasing responsibilities, spend 15% or more of their time on purchasing activities, or make purchases exceeding **\$5,000**.

Key Takeaway: Employees performing procurement or contract-related duties must complete the applicable State-required training and certifications to ensure compliance with Texas laws and TSUS policy.

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**
- Cannot receive **benefits/gifts** for performing official duties or that may result in an obligation
- Do not **misuse information**
- No **self-dealing**
- No **workarounds** for policy (e.g., splitting orders to get under thresholds)

It is imperative to follow **all state policy, rules, and regulations** when working in a procurement role. Actions and communications must be **free from perception** of impropriety. If it feels **wrong**, it probably is **wrong**.

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?

Procurement professionals are stewards of public funds.

They are responsible for ensuring government resources are spent appropriately, transparently, and in the best interest of the public while maintaining the highest ethical standards.

Conflict of Interest

A conflict of interest may occur when an employee's official responsibilities overlap with personal interests. Even the appearance of a conflict can impact public trust and may influence an individual's ability to make impartial decisions.

Key Principle:

Procurement decisions must always be based on fairness, transparency, and the best interest of the institution—not personal gain or relationships.

How to avoid Conflicts of Interest

When a state employee identifies a potential conflict of interest, they must take appropriate action to protect the integrity of the procurement process.

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

Disclose: Promptly disclose any actual or potential conflict of interest, including relevant individuals involved and any reasonably foreseeable financial benefit.

Recuse: Remove yourself from the procurement process when a conflict is substantial or may impact your ability to make an impartial decision.

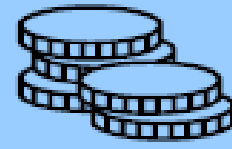
Key Principle:

Transparency and accountability are essential to maintaining public trust and ensuring fair procurement decisions.

Violating State Standards- Ethics

Consequences for violating state standards may include:

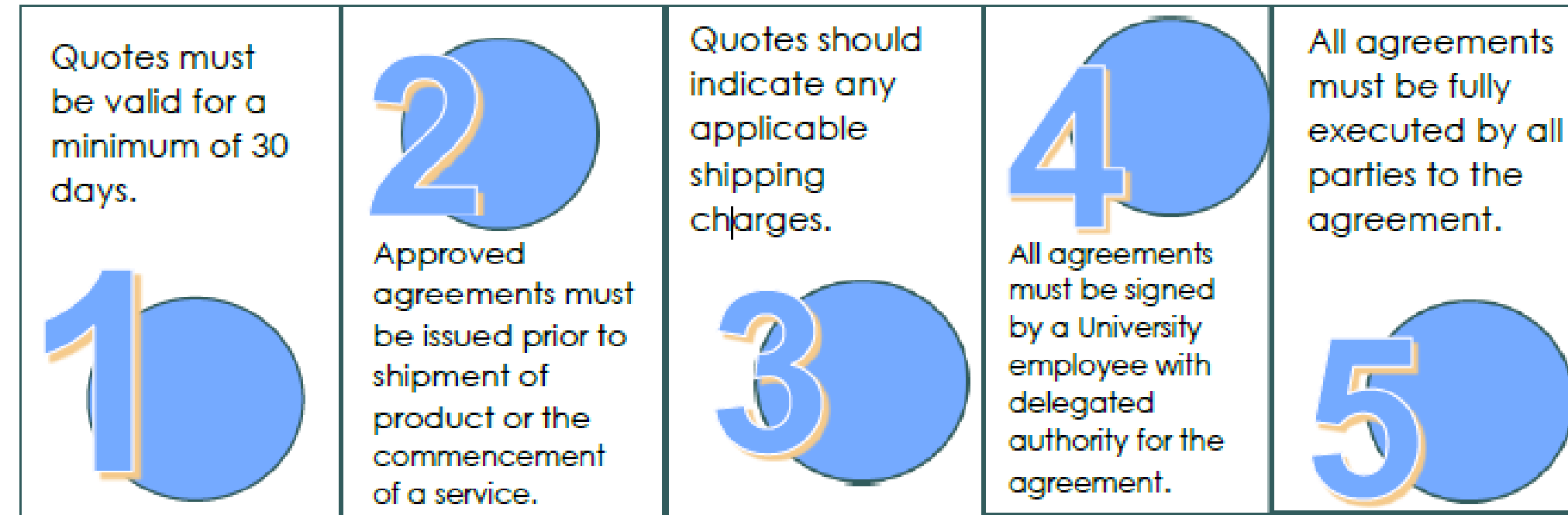
1. Termination of employment
2. Employment-related sanctions
3. Any applicable civil or criminal penalties



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

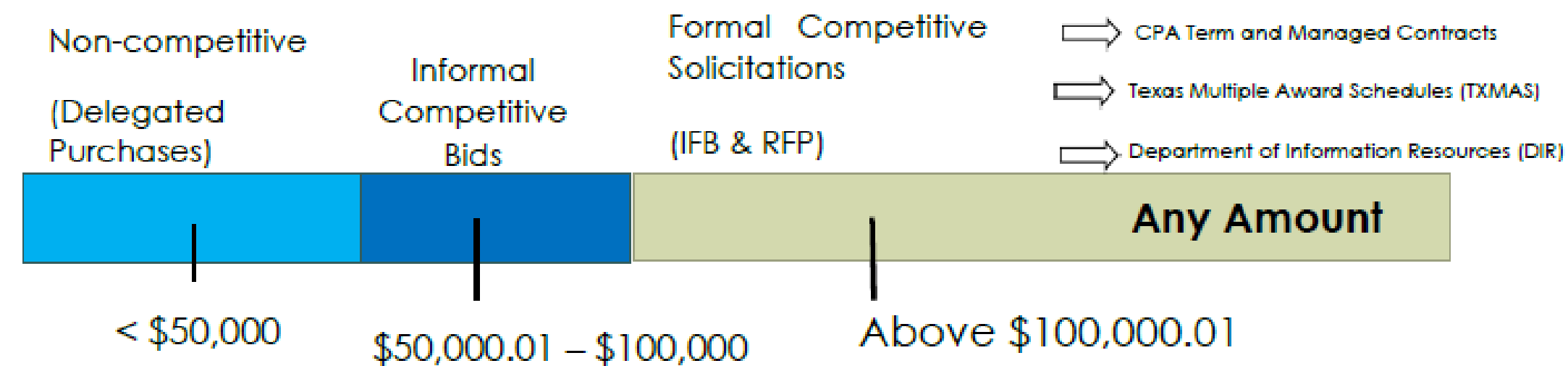
\$50,000

THINGS TO KNOW...



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

Solicitation Process



Procurement & Strategic Sourcing

JC KELLAM, SUITE 527 | 512-245-2521

purchasing@txstate.edu

Texas State University

FORMAL BIDDING OPPORTUNITIES



PLEASE CONTACT P&SS OFFICE

Mandatory Checkpoints and Exceptions

IT & Accessibility (Absolute Clearance)

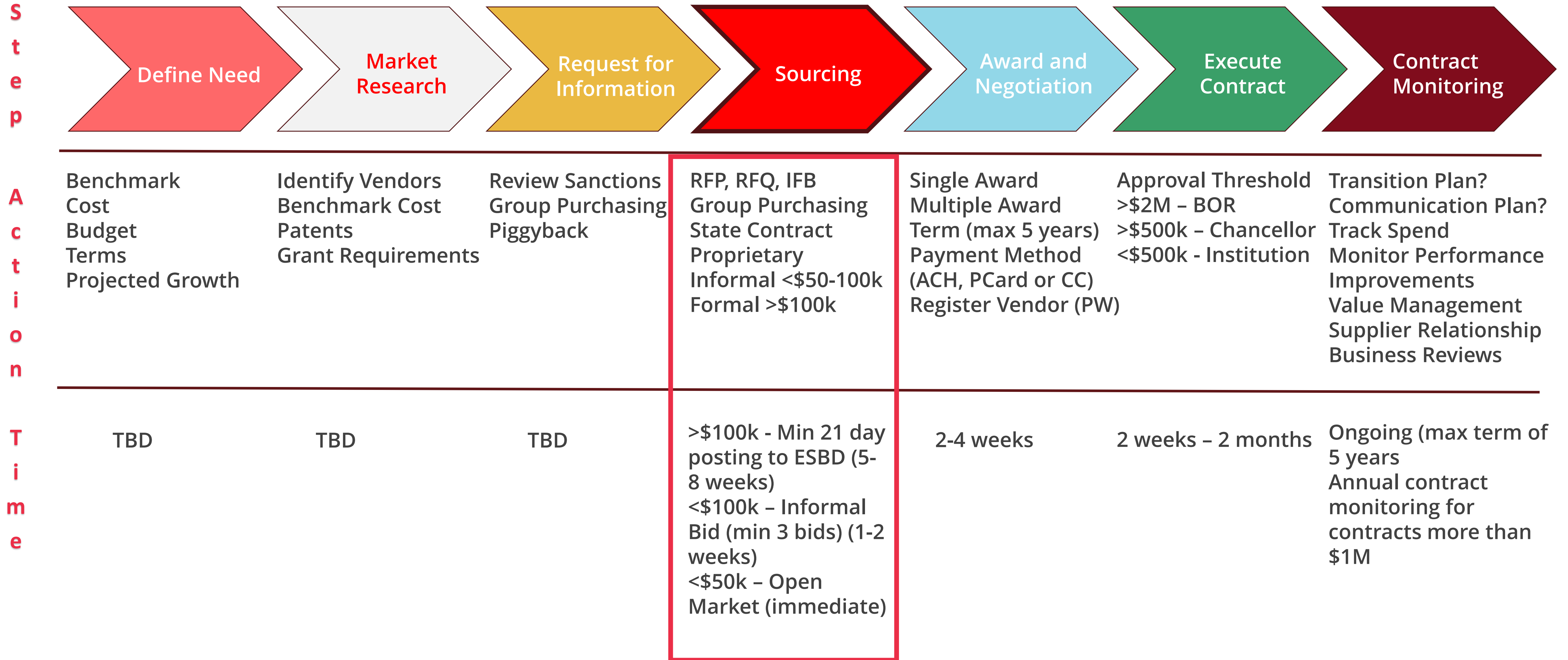
- **The Rule:** ALL software and information technology procurements require clearance before submitting a Contract Request.
- **The Reality:** There are absolutely no exceptions for "low-dollar" software purchases.



Exceptions of Last Resort

- **The Rule:** Proprietary and Sole Source justifications are exemptions, not procurement methods.
- **The Burden of Proof:** The requesting department bears the burden of demonstrating to P&SS that a product has a distinctive feature not shared by competing products, as defined in Texas Education Code 51.9335(b).

7 Steps to Strategic Sourcing



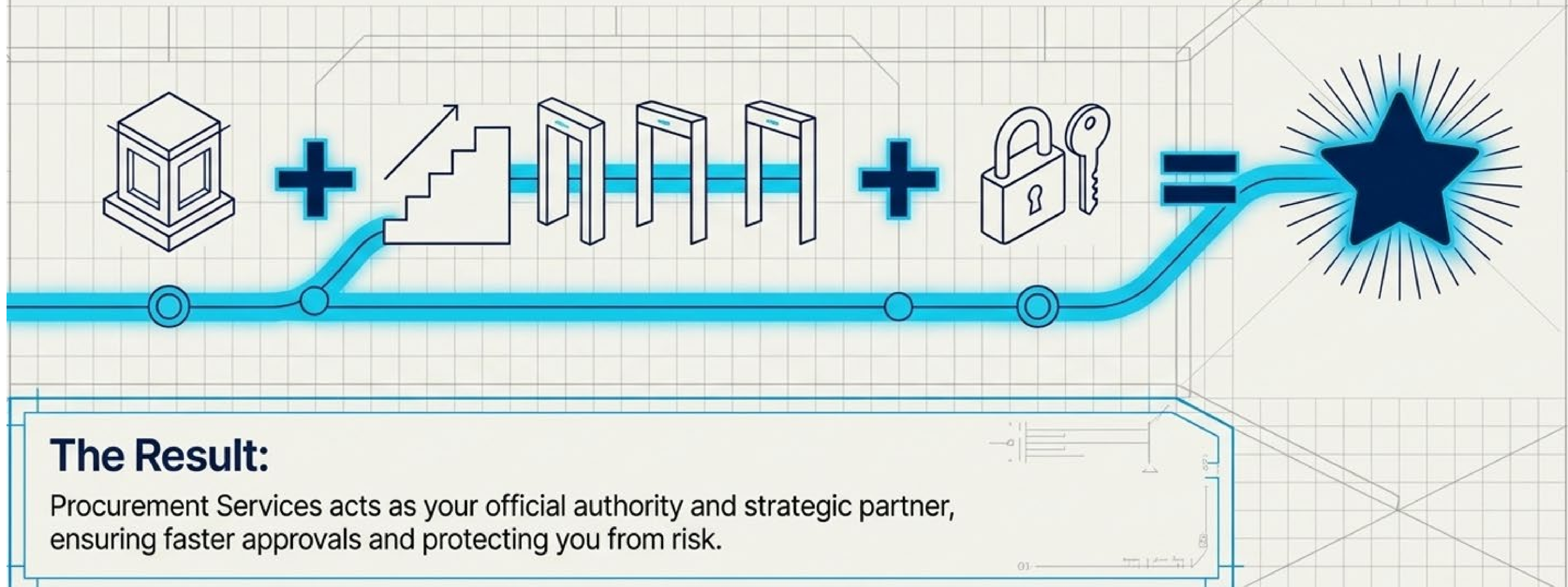
Synthesis: The Complete Proactive Pathway

Ethical Foundation
(Public Trust)

Appropriate Pathways
(Thresholds & Checkpoints)

Proper Keyholders
(Delegated Authority)

**Institutional Growth &
Zero Personal Liability**



CONTRACT MANAGEMENT–CONTRACT AUTHORITY

- **Only authorized TXST representative** may enter into certain contracts, agreements, or purchases, on behalf of the University (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”.
- Texas State is **not bound** by a contract, agreement, or quote with terms and conditions that was *signed by an unauthorized person* on behalf of the university. If faculty/staff **sign on behalf of TXST without having the delegated signature authority**, and the university **refuses to honor** (repudiates) that contract: The person who **improperly signed** may have to **pay for any damages** as a result — **personally**, not through the university.

The Power to Bind: Procurement Authority



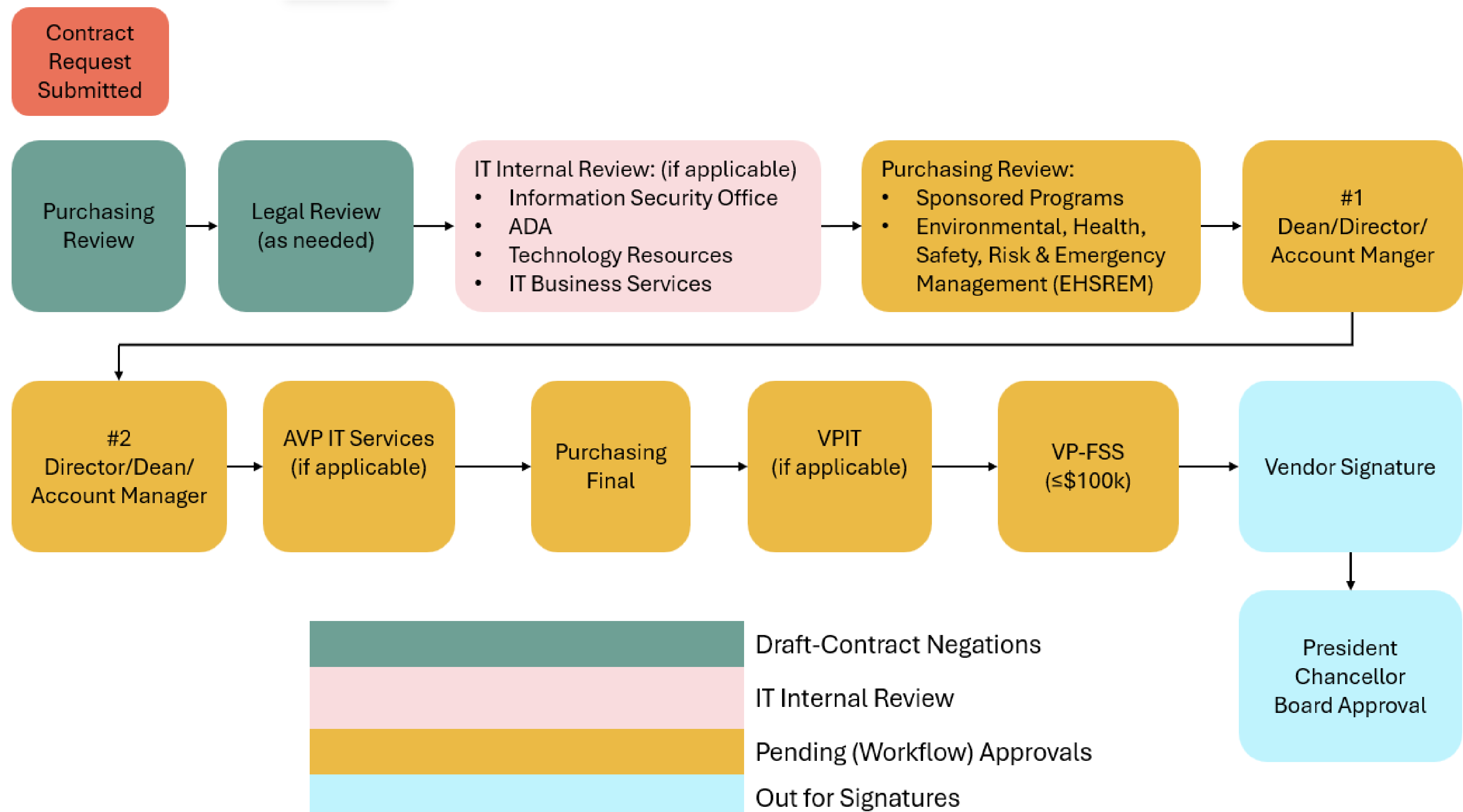
CRITICAL WARNING: The university is not bound by a contract, agreement, or quote containing terms and conditions that was signed by an unauthorized person. Rogue negotiations are strictly prohibited.

CONTRACT MANAGEMENT

TXST is committed to executing contracts in compliance with applicable state mandated laws and TSUS Rules and Regulations.

- All Contracts/Agreements and/or quotes with terms and conditions are required to be entered into TSUS Marketplace Contracts system. This serves as the central contract repository and system of record for all TXST.
- **Contract Request** – Submit in TSUS Marketplace Contacts system - [How to Create and Submit a Contract Request](#)
- All contracts require review by Procurement & Strategic Sourcing **prior** to approval.
- Contract review may include these additional offices:
 - TSUS Office of General Counsel (routed through the P&SS office)
 - IT Internal Review
 - Sponsored Programs
 - Environmental, Health, Safety, Risk, Emergency Management
- Contract Manager (Department Stakeholder) performs contract monitoring per TXST Contract Management Procedures located at: https://www.txst.edu/procurement/contracts/routine_contract_monitoring.html.

Minimum Estimated Completion Time: 2-11 weeks depending on threshold/signature authority



CONTRACT MANAGEMENT - Continued

Work directly with your Contract Specialist on these items:

- **Contract Renewals** – Notify your Contract Specialist a minimum of **60 days prior** to expiration date.
Refers to the extension of the original contract term beyond its initial expiration date. Renewals may be automatic or require mutual written agreement by Amendment, as specified in the contract terms. All renewals must be processed in the TSUS Marketplace Contract system in advance of the expiration date.
- **Contract Amount** – The "Not-to-Exceed Contract Amount" represents the maximum dollar amount that may be encumbered on a requisition for a Purchase Order (PO) and subsequently paid to the vendor. Any increase or decrease to this amount must be formally processed through an Amendment in the TSUS Marketplace Contract system, which must be reviewed and approved by our office prior to obtaining signatures from the vendor.
- **Contract Term** – Refers to the specific period during which the contract is valid and enforceable. It includes the start and end dates, as outlined in the contract. Services or goods must be delivered within this time frame. Any extension or renewal beyond the original term requires prior approval and may necessitate a formal Amendment or new agreement.

CONTRACT MANAGEMENT - Continued

Contract Monitoring Form - Required for Contracts Valued at \$1 Million or More

- A Contract Monitoring Form is required for all contracts with a total value of **\$1 million or greater**.
- The form documents the University's monitoring activities to ensure:
 - Contract requirements and deliverables are being met.
 - Vendor performance is evaluated and documented.
 - Payments align with contractual obligations.
 - Risks, issues, and corrective actions are identified and addressed timely.
- Departments are responsible for actively monitoring vendor performance throughout the contract term and maintaining appropriate documentation.
- Enhanced monitoring requirements may apply based on the contract's risk level, scope, and statutory requirements.

FS-07 Contract Close-out – Required for all contracts \$1,000,000 or greater.

All P&SS forms and resource documents are available at: <https://www.txst.edu/procurement/forms.html>

Purchasing Overview - Guidelines Summary

Dollar Range		Solicitation Method
\$0	<\$50,000	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>
≥\$50,000	<\$100,000	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.
	≥\$100,000	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 • 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 • 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?

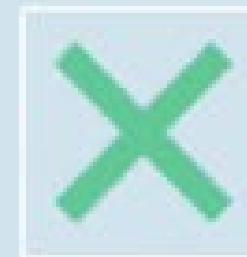
Purchasing Overview

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.

Common Purchasing Mistakes

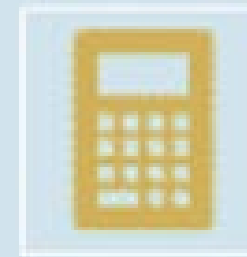
Purchase Orders: Common Mistakes



Not having supporting documentation for solicitation



Forgetting to put the contract number on the PO



Forgetting to budget check the PO

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 >\$50,000 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 >\$50,000.
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 are required to be attached for purchases \$15,000.00 and above.
- Supporting documentation should be attached to every requisition submitted. (quote, bid, vendor email)
- Make sure to select the correct information on your marketplace requisition (material group code, account assignment category, etc.)
- PO selection- ensure to select the correct PO type for your purchase.
- TXST Required Forms per Procurement: https://www.txst.edu/procurement/contracts/contract_forms.html
- 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

- 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**)
 - 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)
 - 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
 - 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**)
 - Added open market for a procurement method for purchases <\$50k.
 - 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

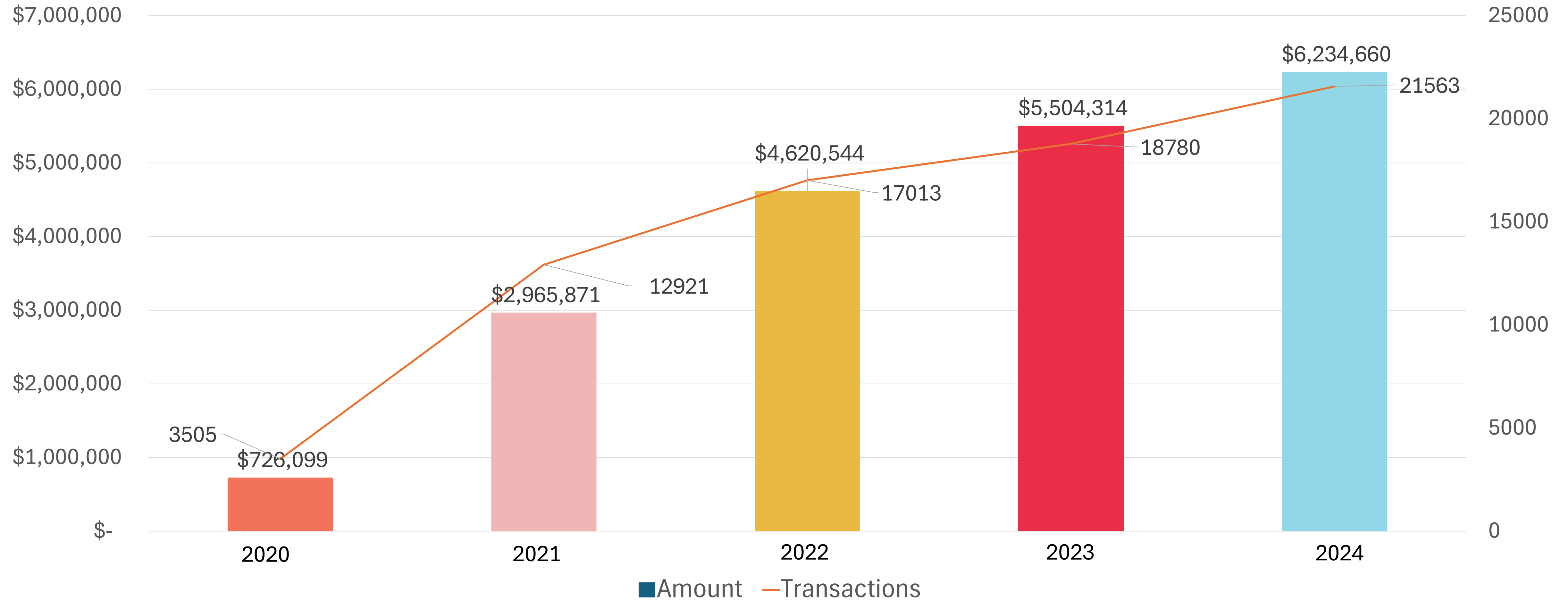
- FS-05 – Exception to policy, available on P&SS website. **Replaces AP-12**
- FS-08 – Request to purchase alcohol, available on P&SS website. **Replaces AP-12**
- Prepayment Form – All prepayments of **\$1,000 or more** require completion of this form and submission to Procurement for approval before a requisition can be submitted.

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

- **Reminder all existing policies and procedures remain in effect under the new provider.**
- Updated Procurement Card Guidelines and Procedure Manual and New Pcard Forms are located on the Pcard website under forms
- **P-Card purchases to foreign vendors are now prohibited, this when into effect as of March 2026.**
- Software purchased will require an Exception form and IT approval stating Pcard is being used for purchase (if IT approval states to process requisition, it will be sent back)
- Prohibited items – **Flowers, Floral Arrangements or Plants can only be purchased for official University Events**
- Exception forms are no longer required for Food, Awards, Catering, Meal, and Food Services (not food for resale). Exception and Increase forms are still required for increases and restricted purchases
- 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 Independent Contractor Determination Form – 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 attachment).
- 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](#) or <https://www.txst.edu/procurement/howtopurchase/procurementcard.html>

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.**
- 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.

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.

VetHUB Program Changes (Veteran Heroes United in Business)



On Tuesday, December 2nd, 2025, the Texas Comptroller of Public Accounts instated Emergency Rules for the HUB Program

Effective May 12th, 2026, these rules have been adopted into the Texas Administrative Code (TAC)

Small Businesses (SBA) certified companies, which is at least 51% owned by a Service-Disabled-Veteran and primarily based in Texas.

How does this effect you?

- The only thing changing in our procurement processes is which vendors are considered HUBs.
- Good Faith Efforts (GFE) are still required for all purchases above the designated thresholds:
 - For purchases from \$50,000.01 to \$100,000 an informal bid form must still be included.
 - You must include 3 Vendors from the Centralized Master Bidder List (CMBL) two of which must be VetHUBs
 - For purchases $\geq$ \$100,000 a formal solicitation must still be completed.
 - For Purchases $\geq$ \$100,000 a Subcontracting Plan or HUB Determination Form (HDF) must be completed.

New Subcontracting Plan:

The Comptroller's Office has released a new Subcontracting Plan for Procurements \$100,000 and above.

Two Compliance Methods:

- Self-Performing
- Good Faith Effort
 - The main contractor is required to notify two VetHUBs.
- A goal will be stated on the form – but this is no longer a method of compliance – the Vendor is not required to meet it.

SUBCONTRACTING PLAN INSTRUCTIONS

The contracting agency must complete this section and include this form in the solicitation.

or PO#	or Short Text // project name // SOW // anything to identify which project the plan is for
Solicitation Number	Solicitation Title
754	Texas State University
Agency Number	Agency Name

AGENCY COORDINATOR FOR COURTESY REVIEWS (OPTIONAL)

Damien Dalton-Nanez	
Name	
hub@txtstate.edu	(512)245-2521
Email Address	Phone Number: (Point of Contact)

SOLICITATION POINT OF CONTACT

University Contact	
Name	
Email Address	Phone Number: (Point of Contact)

The contracting agency must describe the subcontracting goal and provide examples of potential subcontracting opportunities. This information may also be included in the solicitation document.

Goals are the same as the old HSP:
11.2 percent for heavy construction other than building contracts
21.1 percent for all building construction, including general contractors and operative builders' contracts
32.9 percent for all special trade construction contracts
23.7 percent for professional services contracts
26.0 percent for all other services contracts
21.1 percent for commodities contracts.

Please identify at least one subcontracting opportunity by NIGP Code
IF a solicitation is posted, include the deadline to send notifications (7 business days, not including the day sent).

P & S S a t i s f a c t i o n S u r v e y



Was this training helpful?

Are there any additional questions about the procurement
process you need answered?

Please scan the QR code to take our survey and let us
know your thoughts!

PROCUREMENT TRAINING AVAILABLE

- Procurement 101 – Foundations of Public Procurement offered monthly via Success Factors
- 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)

Ongoing Support and Resources



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!

