



Momentum

Quarterly Newsletter for Financial & Business Services at the University of Utah
Fall Semester 2013



**PURCHASING
UPDATES**

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New Criminal Provisions: Gratuities and Kickbacks *Submitted by Glendon Mitchell, Purchasing*

The Purchasing Department has engaged in considerable outreach efforts to inform the campus community about recent and significant developments in the State law related to procurement. One of the most concerning topics for the campus community is new criminal provisions related to “Gratuities and Kickbacks”—the acceptance of items of value from vendors and others interested in selling items to the University. This article offers an overview of the major points to be aware of under the new law.



The criminal provisions related to acceptance of gifts apply to University employees engaged in 2 roles:

(1) Procurement Participants: employees preparing for, administering, conducting, or making decisions regarding a procurement process; those making a recommendation/award regarding a procurement contract or decision to obtain a procurement item from a particular party; and those evaluating a bid, quote or response during a procurement process.

(2) Procurement Contract Administrators: employees who administer a current procurement contract including making payments, ensuring compliance with the contract, auditing or enforcing the contract.

(continued on next page)



Notable Changes

Recent Procurement Code Developments: Gratuities and Kickbacks *(Continued from cover)*



If you are currently engaged in either of these roles, then the prohibition on gifts and gratuities applies to you and your family members. This means it is unlawful for an interested vendor to give you a gift and for you to accept the gift. “Gift” includes travel, meal, lodging, money, loan, entertainment tickets, etc. — regardless of the value.

There are some exceptions. First, there is a very narrow exception for “**hospitality items**” valued at less than \$10. Hospitality items include a pen, stationary, toy, pin, trinket, snack, nonalcoholic beverage, or appetizer. It does NOT include a meal, money, ticket, admittance to an event, entertainment, travel or lodging. Hospitality items may be accepted from a vendor as long as the value of hospitality items from one vendor does not exceed \$50 in one year.

There is also an exception for “**contributions**” to public entities as long as the contribution is not made with the intent to influence a procurement process or administration of a procurement contract. This exception includes the following activity:



(1) It is lawful for a vendor to provide a voluntary donation to the University for the University’s use. This includes donation of money, services or other items of value.

(2) It is also permissible for a vendor to provide to the University admission to a seminar, supplier fair, charitable event, fundraising event or similar event that relates to the function of the University.



(3) It is also lawful for a vendor to sponsor a University event or for a vendor to purchase a booth at an event sponsored by the University.

In general, we recommend that the best practice is to separate those engaged in procurement activities and administration of procurement contracts from those engaged in development and other activities involved with donations/contributions. By clearly differentiating these roles and having separate employees fulfill these duties, it will alleviate the potential for the appearance of a violation of these new criminal provisions.

We recognize that the criminal nature of these provisions enhances the concern of employees and Departments. If there is any question about the propriety of any conduct, please don’t hesitate to contact the Purchasing Department or the Office of General Counsel for further guidance.



New Edition - “Purchasing Card Handbook” Submitted by Jane Scott, Purchasing Card

In conjunction with updating Cardholder Training, we’ve written a Purchasing Card Handbook as a reference to be used by everyone who has a responsibility involving PCards. This includes new and current cardholders, reallocators, and supervisors with authority to review and approve PCard transactions. We hope all of you will read the Handbook as there have been changes that impact purchasing practices and your use of the PCard.

The Handbook should be read by applicants for PCards prior to completing the online quiz. They must have a score of at least 80% in order to receive a purchasing card. The Handbook will have all of the material you will need to know in order to pass the quiz.



While retraining is not required for current cardholders, we encourage them to also read the handbook so they’ll better understand best practices and procedures for using and managing the PCard. Supervisors should also understand the PCard program and their role in overseeing compliance in their department.

U FINANCIAL & BUSINESS SERVICES
THE UNIVERSITY OF UTAH

HOME BLOGS CALENDARS DEPARTMENTS FORMS NEWS RESOURCES TRAINING TUITION

Purchasing Card

- Ask Us
- Contact Us
- Overview and Mission Statement
- Training
- Forms
- Frequently Asked Questions
- Reallocation Process
- PaymentNet – JP Morgan Online

Useful Links

- FBS Organizational Chart
- U Regulations Library
- EthicsPoint
- FBS Blogs

Contact Purchasing Card

call: 801.581.7241
1901 E. S. Campus Dr. Room
151 SLC UT 84112-9351
pcard@purchasing.utah.edu

Purchasing Card
The Preferred Method for Small Dollar Procurement

Overview and Mission Statement Training Forms

Using the PCard FAQ's Reallocation Process

The online version of the Handbook, found on the Purchasing Card website – “Using the Pcard”, has information and links to resources that can help you find answers to frequently-asked PCard questions. It will also be an effective way to let you know of improvements and changes to the PCard program. Checking the revision history located on the last page is a quick way to see if there are recent updates.

We appreciate the cooperation of everyone involved with PCards and the good job they do!



Help the University of Utah move up in the Pac-12 by purchasing recycled paper

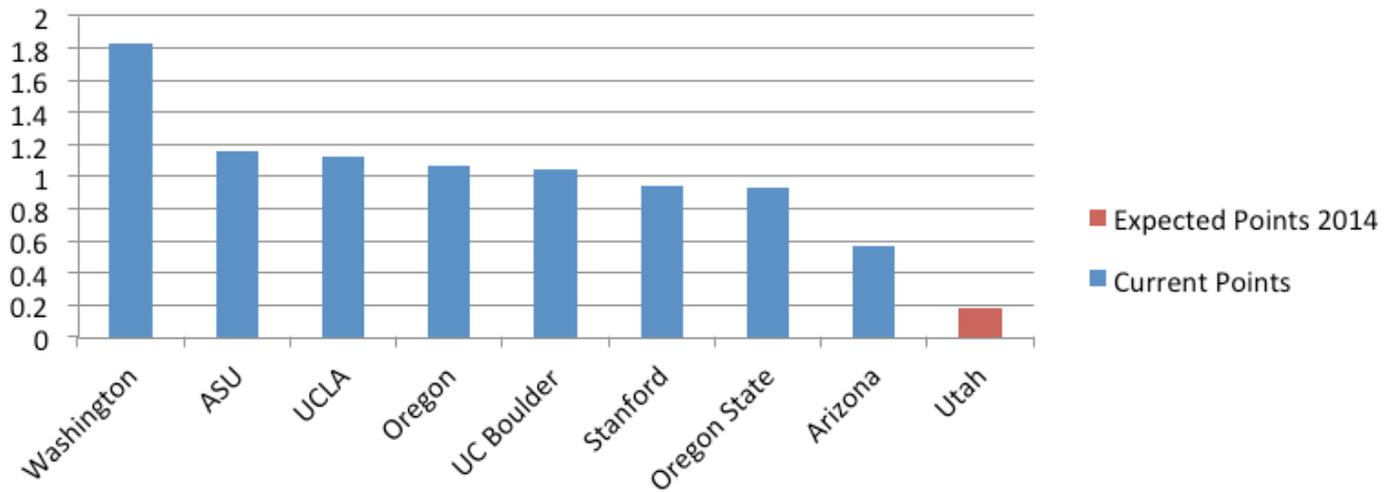
Submitted by the Office of Sustainability, Facilities Management

You might ask yourself, “What does the PAC-12 have to do with recycled paper?” As it turns out, a lot. The University of Utah uses the national Sustainability Tracking, Rating, and Assessment System (STARS - <https://stars.aashe.org/>) to measure its sustainability performance, and so do most of the other Pac-12 schools. Several of the STARS credits deal with purchasing, including buying recycled content printer paper.



The University of Utah ranks last among reporting schools in the Pac-12 for purchasing recycled paper. Currently, only 20 percent of our purchased paper has any recycled content. Compare that to the University of Washington, where more than 80 percent of their purchased paper has recycled content.

STARS Recycled Office Paper Purchasing in the Pac-12



Did you know that recycled paper isn't necessarily more expensive than virgin paper? Look for 30-50 percent recycled paper at almost the same price point as virgin paper. Also, let's debunk the myth that recycled paper jams the copy machine—this may have been true 20 years ago, but not today. Shred those “old school” thoughts and try out recycled paper—you'll find it works the same as virgin paper and helps the planet. Recycled-content paper is designed to work smoothly with laser and inkjet printers, both large and small scale. Not to mention purchasing even 30 percent recycled paper will give us more points in STARS—and bring us closer to our PAC-12 peers.

How can you help the U move up in the PAC-12 in STARS?

- Check out the University's Environmentally Preferable Purchasing Guidelines. Purchase Energy Star products, products with recycled content, and look to recycle, reuse and reduce supplies wherever possible. Contact University Surplus and Salvage for office equipment that can be repurposed.
- Support small and historically underutilized businesses. Contact Randi Ruff for more information.
- Make sure that the computers bought in your department are certified EPEAT Gold or Silver. EPEAT is a rating that most Dell, HP, Apple, etc. computers have to make sure that the computers are produced in a responsible way.
- Book business travel through the University Travel Office. The University can keep track of total air miles better this way than if you book it yourself and get reimbursed.
 - o Consider setting up web conferences and meetings instead of booking air travel, where possible.

Interested in other ways to green your office and department? Contact the Office of Sustainability for information on how to start a Green Team, how to host Green Events and other ideas.



Hey, did you know that we have really cool ListServes that will send informative messages right to your email inbox?

SIGN UP HERE



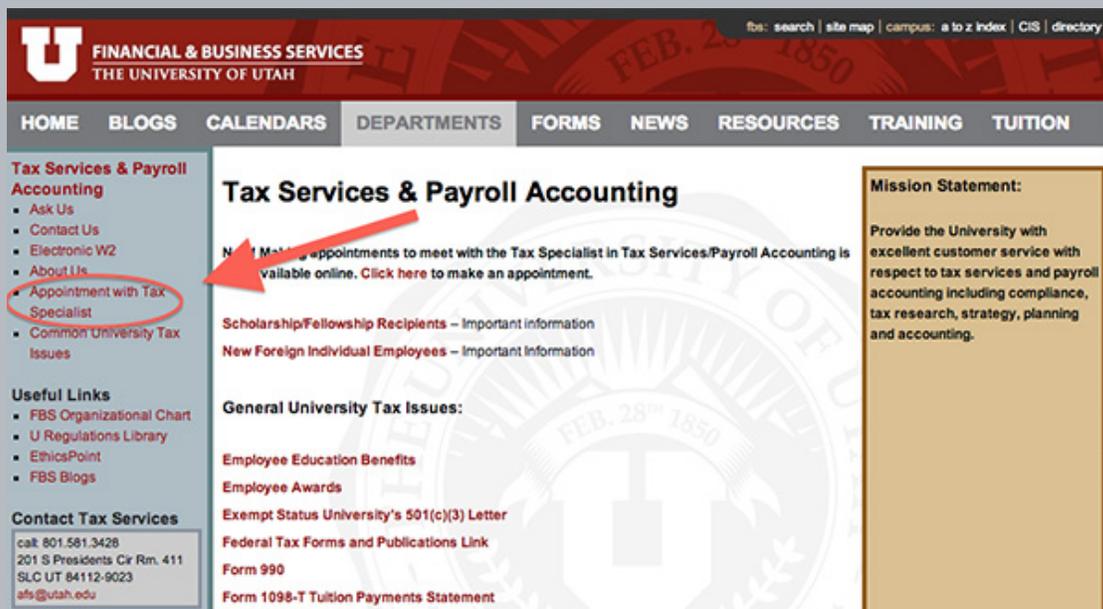
Make an Appointment with a Tax Specialist

Now available online in three easy steps!



Submitted by Sara Emery, Tax Services

In order to simplify the appointment making process for Non Resident Aliens, Tax Services/Payroll Accounting has implemented an on-line calendar. Rather than back and forth emails or phone calls, foreign individuals can go to the [Tax Services/Payroll Accounting website](#) to schedule their appointment. The link is on the left side column under "Appointment with Tax Specialist." This link opens a page with the current month as well as the following two months. Unavailable days are crossed out and are unavailable.



Please instruct foreign individuals to:

1. Go to the desired date and click on it. The available times for that day pop up in 15 minute increments.
2. Click on the desired time and the time/date appears under the calendar.
3. Complete the three boxes below as well as the Comments/Questions field, if needed, and click "Continue." Two emails will be sent from the system. One to the individual as confirmation and the other to the Tax Specialist.

Who needs to meet with a Tax Specialist?

Individuals who need to meet with the Tax Specialist are foreign individuals employed by the university (bi-monthly checks) and/or are receiving a scholarship/fellowship (one-time, monthly or per semester) to determine their tax status if they have not previously done so. They will need to bring their current passport and visa and any previous passport if their first entry as a student or teacher/researcher is stamped in it. They will also need their U.S. Social Security Number if they have one.

If you have any questions, please contact Tax Services at (801)581-3428

Utah Correctional Industries (UCI) Supplier Showcase



Submitted by Glendon Mitchell, Purchasing

UCI is a state program and has been a long term supplier to the University. UCI provides furniture, apparel embroidery and asbestos abatement as well as several other goods and services.

UCI will be joining many other suppliers and providers at Employee Appreciation Day on Sept. 26. 2013. Please plan to stop by their booth to learn more about various goods and services provided by UCI as a State contract provider.



**Visit us at Employee
Appreciation Day!**

Additionally, three of the most popular desk chairs supplied by UCI are on display at Purchasing along with information on their entire seating selection. These high quality and low priced chairs include a 10 year warranty. Please stop by weekdays anytime from 8-5, 1901 S. Campus Drive, Room 151. With questions on UCI seating or furniture contact the buyer, Michelle Entwistle, at 801-581-4022.

How can General Stores help “U”?

Submitted by Katie Fotsch

As Fall Semester begins, we are reminded of the many diverse activities that happen within our dynamic campus community. The University of Utah is not only an institution of higher learning, it also includes research facilities, inspiring sports teams, museums, theaters, as well as hospitals and clinics. The University's diverse community works to improve, inspire, and assist our community as a whole. The University's broad spectrum of activities and services creates a broad need for supplies – and University General Stores is here to assist with this demand. University General Stores' goal is to "... provide the highest quality material support at the lowest attainable cost..." for our customers throughout the University.

We carry a variety of products including: medical and office supplies, compressed gasses, electrical supplies, as well as shipping services. If you need an item that we do not carry in stock, we can special order to fill your needs.



We encourage you to check out our website: <http://fbs.admin.utah.edu/stores/>. If you don't see the product you seek, give us a call at (801) 581-8671. We are happy to provide a quote on special order items.

We would love to see you at our booth at the University's Employee Appreciation Day! This year we will be joining The Office of Sustainability to focus on some of the great recycled products available. Make sure you stop by to pick up a small token of our appreciation, for you, and enter in our prize drawing. You won't want to miss it!



Alicia (Tia) Parry – General Stores and Receiving Customer Service Representative

General Stores is happy to welcome Alicia Parry to the department. Alicia is a California native, hailing from Hayward, CA. She lived in CA until she was 12 years old, when she moved to Utah with her family. She said one of her most unique childhood experiences was actually being hit by a bus. The accident put her straight into a coma, but not to worry, she does not remember the accident. Her first memory after the accident was walking in the hospital. It caused the hospital staff quite a bit of excitement when their coma patient, woke surprisingly and was walking about. Also, this

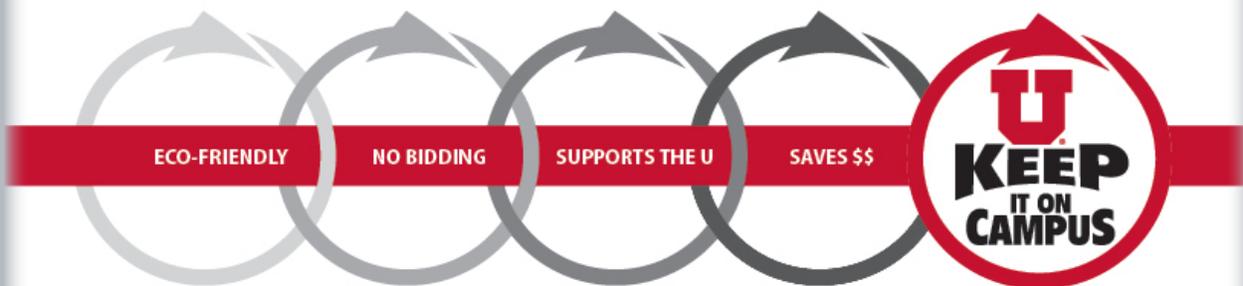
experience proved to be a bonding point when she met her current boyfriend, as he, also, was hit by a bus during the same time frame, but in a different state.

Alicia remembers her transition to Utah, very clearly. She had never seen mountains before and fell in love with the local landscape immediately. She has lived in Utah since her family’s move. She graduated from Alta High School and then received associate degrees in General Studies and Phycology from Salt Lake Community College. She aspires to continue her education at the University of Utah. Her intentions are to pursue a degree in Anthropology and/or Archeology.



Tia is part of a customer service team you can call to: “Place orders...one stop place to shop.”
(801) 581-8671

WHY SHOULD **KEEP IT ON CAMPUS?**



Visit www.ukic.utah.edu for a list of services.

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- THE POINT | UNIVERSITY PRINT & MAIL SERVICES | RED BUTTE GARDEN & ARBORETUM | TOWER AT RICE-ECCLES
- TRAVEL | UNIVERSITY CAMPUS STORE | UNIVERSITY GUEST HOUSE | UTAH MUSEUM OF FINE ARTS

Small Business Spotlight

Submitted by Randi Ruff, Small Business Liaison

Highland Electric Corp. is a first-rate electrical contractor that has been in business since 1991. Highland Electric offers expertise in the following areas: Business, Industrial, Government and Design-Build. Our firm also provides services in the teledata, fire alarm, controls, security and fiber optics.



24 hr. Maintenance and service department

Highland Electric has a fully staffed maintenance service department for around the clock repairs & maintenance.

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Highland Electric is a Women-owned small business | 687 W 6960 S, Suite A | Midvale, UT 84047
801-562-5317 | www.highlandelectric.net



JJH Auto Body & Paint LLC

JJH Auto Body & Paint are leaders and pioneers in the industry because of its commitment to be a GREEN auto body shop. At JJH Auto Body & Paint we are a family of over 30 years of experience in the automotive collision industry. JJH Auto Body & Paint is currently doing business with UTA, Salt Lake City Corporation, Fox Rent A Car, Hertz,

South Salt Lake Police Department, Budget, Avis and many more. JJH Auto Body & Paint is a minority-owned company that started in 2009.

JJH Auto Body & Paint | 140 S Navajo Street | Salt Lake City, UT 84104 | 801-355-3411
www.jjhautobodypaint.com

Please join us in congratulating the following FBS employees for their length of service:

5 Years

John Allred (August 5); Storekeeper 3, *General Stores and Receiving*
Todd Kapos (October 1); Manager - Financial Reporting, *General Accounting*

10 Years

Mark Patterson (August 5); Grants Accounting Officer, *Grants & Contracts Accounting*

15 Years

Bob Laird (July 20); Accountant, *General Accounting*
Pam Holland (August 28); Associate Accountant, *Payables Production*

20 Years

Georgette Kimberly (August 30); Grants Accounting Officer, *Grants & Contracts Accounting*
Kay Christensen (October 18); Associate Accountant, *Property Accounting*

25 Years

Stuart Kasten (December 5); Sr. Accountant, *General Accounting*

35 Years

Alayne Merritt (July 1); Grants Accounting Officer, *Grants & Contracts Accounting*
Dave Heaps (October 2); Manager - Accounting & Finance, *General Accounting*



Communicating with U



FBS Serves U

- Commitment to Communication
- FBS Training
- FBS Regulations
- Mission, Vision & Values
- Momentum Newsletter
- Org Chart

Tools for U

