THE UNIVERSITY OF TEXAS AT EL PASO

Purchasing Department Operating Procedures

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SECTION 1 – ETHICS POLICY

This procedure is issued to establish effective guidelines for ethical practices of procurement Personnel consistent with UTEP/UT System Policy and applicable laws and regulations.

All Procurement staff shall follow and adhere to the UT System Board of Regents Rules and Regulations relating to Standards of Conduct, Series 30103 and Conflict of Interest, Series 30104.

All official purchasing agents shall review and finalize all disclosures via the UT System Outside Activity Portal after the end of the calendar year during the annual reporting period (January through March of the following year).

Code of Ethics

The following is a general summary of the ethics standards and provisions related to the use of state resources that apply to employees of the UT System.

- **Conflicts of Interests:** Officers and employees of the UT System may not have a direct or indirect interest, financial or otherwise, that is in substantial conflict with the proper discharge of their duties. Potential conflicts of interest must be disclosed. Potential conflicts of interest must be disclosed using the Conflict of Interest/Commitment Electronic Reporting System.
- **Gifts:** An employee should not accept or solicit any gift, favor, service, or loan that might reasonably appear to influence the employee in the discharge of official duties. *Note: Accepting a gift may constitute a criminal offense under certain circumstances.*
- **Outside Employment:** An employee should not accept outside employment or compensation that could reasonably be expected to impair the employee's independence of judgment in the performance of the employee's official duties. Prior approval is required for outside employment.
- **Outside Board Service:** An employee's outside board service may not create a conflict of interest or impose an unreasonable time commitment. Prior approval is required for outside board service.
- **Honoraria:** An employee may not accept an honorarium for services the employee would not have been asked to provide but for his or her official status.
- **Nepotism:** The employment of certain relatives of a member of the Board of Regents is prohibited. Relatives of existing employees of the UT System may be hired but neither relative may supervise the other nor be involved in any way with the appointment, salary, or promotion of the other.
- **Personal Investments:** An employee should not make personal investments that could reasonably be expected to create a substantial conflict between the employee's private interest and the public interest.
- **Self-Dealing:** An employee may not transact any business in an official capacity with any business entity of which the employee is an officer, agent, or member, or in which the employee owns a

substantial interest.

- **Purchases From/By Employees:** Purchases are not permitted from an employee unless approved by the President or Chancellor, as appropriate, and the cost is less than from any other known source. Similarly, an employee may not purchase equipment or property from the institution without approval by the President or Chancellor, as appropriate.
- **Benefits for Performing Official Duties:** An employee should not solicit, accept, or agree to accept any benefit for having exercised official powers or having performed official duties in favor of another.
- **Confidential Information:** An employee should not disclose confidential information or use confidential information for his or her personal benefit.
- **Sexual Harassment and Misconduct:** Sexual misconduct and sexual harassment include unwelcome verbal or physical conduct of a sexual nature. Such conduct is unacceptable. The UT System and UT System institutions have adopted policies prohibiting sexual harassment and sexual misconduct. These policies are included in the Handbook of Operating Procedures at each institution. Incidents of sexual misconduct or sexual harassment should be reported in accordance with the applicable institutional policy.
- **Disclosures:** An employee should be aware of any ethics disclosures required by law, rule, or policy and should file them in a timely manner.
- **Adherence to Law:** Employees shall adhere to applicable ethics laws, rules, and policies. The failure to do so may be grounds for disciplinary action, including termination of employment.

PURCHASING ETHICS

The following guidelines govern purchasing practices:

- Every effort will be made to obtain the maximum ultimate value for each dollar of expenditure.
- Individuals authorized to make purchases will not accept personal gifts or gratuities that might in any way result in an obligation to individuals or firms seeking business with UTEP.
- Honesty in sales representation is demanded by UT System, whether offered through the medium of oral or written statement, an advertisement, or a sample of the product.
- All qualified, reputable bidders will be given equal opportunity to submit bids on a uniform basis when competition is possible.
- No vendors will receive special consideration or be allowed to revise their offers after the time set for opening bids, except in the case of Requests for Proposal (RFPs).

Staff who participate in the evaluation of vendor bids and proposals are required to sign and abide by a Conflict-of-Interest Statement and Confidentiality Agreement that applies specifically to the solicitation being evaluated. Evaluation team members must sign a separate agreement for every bid/proposal they are asked to evaluate.

ESTABLISHMENT OF PROCEDURES

The Purchasing Agent of each institution and System Administration shall promulgate procedures to facilitate and expedite the purchasing function. Such procedures shall be developed in accordance with sound business practices and applicable State law. New purchasing procedures and changes to existing purchasing procedures shall be implemented only after appropriate review and approval of the chief business officer and the Vice Chancellor and General Counsel; provided, only material changes to purchasing procedures, including new procedures and changes to existing procedures, require review and approval by the Vice Chancellor and General Counsel.

USE OF CLOSED SPECIFICATIONS

Closed specifications shall not be used except in unusual instances clearly justified as being essential to efficient operating performance. Reports of all such exceptions shall be maintained by the Purchasing Agent.

TRANSACTIONS WITH EMPLOYEES

Purchase from, or sale to, any employee of System Administration or an institution of any supplies, materials, services, equipment, or property must have the prior approval of the chief administrative officer. Any such purchases shall be made only if the cost is less than from any other known source. This Section does not apply to sales or purchases made at public auction.

SECTION 2 – TRAINING & CERTIFICATION PROGRAM

In accordance with UT System Policy 156 UTEP has established a purchaser training and certification plan that:

- Requires all personnel who process procurements of goods or services on behalf of the institution or System Administration to obtain appropriate training.
- Requires all personnel who process competitive procurements of goods or services in an amount greater than $25,000 to attain nationally recognized and/or State of Texas buyer certification; and
- Conforms to the guidelines established in this policy.

PLAN DEVELOPMENT

The Purchasing Agent shall be responsible for the establishment, implementation, modification, or change of a training and certification plan.

The plan may be implemented, modified, or changed only after review and approval of the Vice President for Business Affairs and the Office of General Counsel.

At a minimum, the plan must contain the following:

- Identification of personnel who are required to obtain training and/or certification; personnel training and certification levels shall be classified by the type of purchase (e.g., formal bids, informal quotes, small dollar procurements) and level of commitment authority.

- Training requirements for the identified personnel classifications; the training requirements shall identify the subject matter and the minimum hours of training required; and

- Certification requirements for the identified personnel classifications.

CERTIFICATION PROGRAMS

Only the certifications listed below are approved to be included in the training and certification plan.

State of Texas (administered by Statewide Procurement Division, a division of the Texas Comptroller of Public Accounts):

Certified Texas Contract Developer (CTCD)
Certified Texas Contract Manager (CTCM)

DEADLINES AND SUBMITTAL REQUIREMENTS FOR PLAN

The Purchasing Agent is responsible for maintaining a current purchaser training and certification plan which has been approved by the Vice President of Business Affairs and the Office of General Counsel.

The Purchasing Agent shall submit proposed substantive modifications or changes to an institution's plan to the Executive Vice Chancellor of Business Affairs and the Office of General Counsel after the approval of the modification or change by the Vice President for Business Affairs.

PERSONNEL REQUIREMENTS

- Any individual who is hired after September 1, 2002, and who is required to be certified under his or her institution's plan must be certified within 18 months of his or her date of hire.

- Job descriptions for each personnel classification shall incorporate the training and certification requirements applicable to that classification in the job description.

- By January 15 of each fiscal year, the Purchasing Agent at each institution and System Administration must submit to the respective institution's chief business officer a list of all personnel who are certified. The list must include each employee's name, job title, and certification type.

- If an individual fails to obtain training and/or certification for a particular personnel classification in accordance with the requirements set forth in his or her institution's training and certification plan, the individual may not make purchases on behalf of the institution that are permitted for that personnel classification. At the sole discretion of the institution, however, the individual may continue to make purchases on behalf of the institution at those levels for which the individual has attained the required training and/or certification.

SECTION 3 - DELEGATED AUTHORITY

This procedure is issued to document UTEP's delegated approval limits and establish effective guidelines for the purchase of goods and services that exceed UTEP's delegated approval limits consistent with University of Texas System Rules and Regulations, Department of Information Resources (DIR) Rules and Regulations, and applicable laws.

DELEGATED APPROVAL LIMITS AND UT SYSTEM RULES AND REGULATIONS

The Purchasing office abides by the delegation of authority as established by the Office of the Vice President of Business Affairs. Link:

- Delegation of Authority

DEPARTMENT OF INFORMATION RESOURCES RULES AND REGULATIONS

UTEP may not enter any contract, agreement or issue a Purchase Order for a "Major Information Resources Project" unless the project has been approved by DIR in UTEP's Biennial Operating Plan.

A "Major Information Resources Project" means any information resources technology project that exceeds $1 million and that:

- Requires one year or longer to reach operation status.
- Involves more than one state agency.
- Substantially alters work methods of UTEP personnel or the delivery of services to end-users.

All requests in excess of the limits prescribed above shall be forwarded to UTEP's Department of Information Technology for review.

The Purchasing Agent shall document in the Purchase Order/Contract file that the project has been approved by DIR.

If the project has not been approved by DIR, the end user shall consult with the Purchasing Agent.

SECTION 4 – RELEASE OF PUBLIC INFORMATION

This procedure is established to provide guidelines for compliance with release of records under the Texas Public Information Act (Texas Government Code; Section 552).

GUIDELINES

Upon receipt of written request by fax, e-mail, or mail the following steps should be taken:

Receipt by Fax or Email - A request sent via fax or e-mail to anyone other than the PIO or their designee, [the Public Information Coordinator (PIC)], is not a valid request. Respond to the fax or e-mail with the following information:

"In order to submit a request under the Texas Public Information Act via email or fax you must submit your request to tpia@utep.edu or 915-747-5068. For more information go to https://www.utep.edu/vpba/open-records/ or call the Office of the Vice President for Business Affairs at 915-747-5113."

Receipt by Regular Mail or Hand-Delivered - A mailed or hand-delivered request can be sent to any U T E P employee and must be addressed within the time allowed by law. The time allowed by law is 10 working days. Upon receipt of the request, immediately have it delivered to the office of the Vice President for Business Affairs in the Administration Building, Room 301.

The Public Information Coordinator will then forward the request to the Contract Administrator and Compliance Manager who will gather the information requested.

AUTHORITY TO RELEASE RECORDS

The Vice President of Business Affairs or his/her designee has the exclusive authority to release any records.

FORM OR REQUEST

All requests to view or copy Purchasing records must be in writing and should be addressed to the Vice President of Business Affairs. UTEP does not accept or respond to oral requests for public information. If an oral request is received, the requesting party should be directed to address the request in writing to the Vice President of Business Affairs:

Requests can be mailed, hand-delivered, faxed, or sent by electronic mail.

Address: The University of Texas at El Paso
500 W. University Ave., Suite 301
El Paso, TX 79968

Fax: (915) 747-5068
Email: tpia@utep.edu

A written request received, but not specifically addressed to the Vice President of Business Affairs is still valid and remains subject to a ten (10) day time limit (from date of receipt) for UTEP to seek an Attorney General opinion on disclosure. The Office of the Vice President of Business Affairs will make such determinations.

FILING

A copy of both the request and response letter shall be filed with the Contract Administrator and Compliance Manager. The response letter shall identify the date the information was sent to the requesting party.

SECTION 5 – PROTEST PROCEDURES

The University has established formal procedures for handling complaints and protests regarding procurement actions processed by Purchasing or by any UTEP department acting under authority from the Purchasing Agent.

PROTEST PROCEDURES

Any actual or prospective bidder, offer or proposer who is aggrieved in connection with the solicitation, evaluation, or award of a contract may file a formal protest with the Purchasing Agent. Such protests must be in writing and received in the Purchasing Agent's office within ten (10) working days after such aggrieved person knows or should have known of the occurrence of the act or omission being protested.

WRITTEN DETERMINATION TO PROCEED

If a protest meeting the requirements of these procedures is timely received, the University shall not proceed further with the solicitation or with the award of the contract unless the Vice President of Business Affairs, after consultation with the using department and the Purchasing Agent, makes a written determination that it is necessary to proceed with the solicitation or award of contract without delay to protect the best interests of the institution.

FORMAL PROTEST

A formal protest must contain:

- A specific identification of the statutory or regulatory provision(s) that the act or omission being complained of is alleged to have violated.
- A specific description of each act or omission alleged to be in violation of the statutory or regulatory provision(s) identified in the section, "Written Determination to Proceed" indicated above.
- A statement of the relevant facts.
- An identification of the issue or issues to be resolved.
- Argument and authorities in support of the protest.

PRIMARY PURCHASING AGENT REVIEW

The Purchasing Agent shall attempt to settle and resolve the protest concerning the solicitation or

award of a contract, prior to appeal to the Vice President of Business Affairs. The Purchasing Agent may request additional information from the protesting party and the using department to help in the evaluation and resolution of the protest.

WRITTEN DETERMINATION

If the protest is not resolved by mutual agreement, the Purchasing Agent will issue a written determination on the protest.

If the Purchasing Agent determines:

- that no violation of rules or statutes has occurred, the Purchasing Agent shall inform the protesting party and the end user by letter that sets forth the reasons for the determination.
- that a violation of the rules or statutes has occurred in a case where a contract has not been awarded, the Purchasing Agent shall inform the protesting party and the using department by letter which sets forth the reasons for the determination and the appropriate remedial action.
- that a violation of the rules or statutes has occurred in a case where a contract has been awarded, the Purchasing Agent shall inform the protesting party and the end user by letter that sets forth the reasons for the determination and the appropriate remedial action, which may include ordering the contract void.

APPEAL

The Purchasing Agent's determination regarding a protest may be appealed by the protesting party to the Vice President of Business Affairs. An appeal of the Purchasing Agent's determination must be in writing and must be received in the Vice President of Business Affairs' office no later than 10 calendar days after the Purchasing Agent's determination.

TIMELY FILING OF PROTEST AND APPEAL

Unless good cause for delay is shown or the Vice President of Business Affairs determines that a protest or appeal raises issues significant to procurement practices or procedures, a protest or appeal that is not filed timely will not be considered.

APPEAL FINAL

An appeal to the Vice President of Business Affairs shall be limited to review of the Purchasing Agent's written determination of the protest. A decision issued in writing by the Vice President of Business Affairs shall be final.

RECORD RETENTION

All documents related to protests filed with an institution shall be retained in accordance with the institution's records retention policy.

SECTION 6 - CONTRACTUAL RESPONSIBILITIES

The following list is provided to distinguish contractual responsibilities for the Purchasing Office and the VPBA's Office:

PURCHASING OFFICE RESPONSIBILITIES

- Food Services
- Beverage
- Vending
- Commodity
- Services
- Technical
- Software
- Professional Services
- Consulting Services
- Banking Services
- Construction Services
- Ticketing Services
- Custodial
- Hazardous Waste
- Automated Teller Machines
- Radioactive Waste

VPBA OFFICE RESPONSIBILITIES

- Athletic Coaching Agreements
- Facilities Use Agreements
- Interagency Cooperation Agreements
- Space Lease/Rental Agreements
- Special Events/Show Agreements
- Liability, Indemnity, and Release Agreements
- Business Agreements
- Affiliation Agreements
- Logo and Trademark Agreements
- Foreign Institute Agreements
- Search Firm Agreements
- Performers Agreements
- Medical Agreements
- Third Party Agreements for Tuition and Fees

SECTION 7 - METHODS OF PROCUREMENT

The procedures, as follows, outline minimum requirements for orders on the open market (e.g., via Spot Purchases, RFQ, ITB, RFP, etc.). Such minimum requirements do not negate the Purchasing Agent's obligation to ensure a competitive procurement process and best value criteria are met.

It is the Purchasing Agents responsibility to determine appropriate methods of procurement while maximizing VetHUB participation in the solicitation process.

Less than $15,000.00	Open Market	Non-bid, award to best source
$15,000.00 to $49,999	Informal	Minimum: Solicit a minimum of (3) quotes, two of which must be VetHUBs if available
$50,000.00 or greater	Formal	A VetHUB subcontracting plan is required if expected value of purchase exceeds $100k

EXCLUSIVE ACQUISITIONS

Purchases are made on a competitive basis. However, there may be times when competition does not exist, or it is in the university's best interest to use a particular service or product. Since these purchases eliminate competition, the university requires that justification be submitted with any purchase where only one supplier is being considered for requests exceeding $15,000.00. The justification does not require departments to defend the need for the product or service, but it is necessary to:

- Identify the unique features of the product or service.
- Explain the need for the unique features of the product or service.
- Explain why other products/vendors are not acceptable.

For more information, refer to examples of exclusive acquisition justification forms and guidelines for completing the form on the Miner Mall website.

TYPES OF EXCLUSIVE ACQUISITIONS

There are three categories of purchases that require exclusive acquisition.

Sole Source (as defined in Texas Government Code 2155.067) Justification used when the goods or services are only available through a single source. The Purchasing Office establishes that the selection meets best value criteria. Some examples include:

- Equipment maintenance or repair parts from the original equipment manufacturer (OEM).
- Pharmaceuticals or chemical reagents that are only available through one supplier.

- Software or software maintenance that is only available through one software supplier.
- Specific reagents used in long-term experiments. For continuity of research, a lab would need to continue using the same products for the duration of the experiment.
- Compatibility with existing equipment. A laboratory is purchasing a new component from a supplier to add to an existing piece of equipment to enhance its quality/performance.
- A contract or grant specifically names a supplier, product, or service that is required for the university to use.

Emergency Purchase (as defined in Texas Government Code 2155.086)
Occurs because of an unforeseen circumstance that requires an immediate response to prevent financial or operational damage to the university. If a situation arises in which routine compliance with procurement practice is impractical and not the university's best interest, an emergency purchase may be warranted to prevent a hazard to life, health, safety, welfare, or property or to avoid undue additional cost to the university. Emergency purchases of goods or services are performed to restore a system to its original intended functionality and must not exceed the scope or duration of emergency. The Purchasing Office will establish that the selection meets best value criteria.

Professional Services (as defined in Texas Government Code 2254.002)
Professional services providers must normally be pre-qualified based upon a Request for Qualifications (RFQ). The contract award is based on negotiation with the most qualified provider. When a professional service is required and no pre-qualification has been established, a contract award must be justified as an exclusive acquisition to establish that the selection meets best-value criteria.

Professional service providers are normally licensed or certified and the scope of their services include:

Accounting	Architecture
Landscape Architecture	Land Surveying
Medicine	Optometry
Professional Engineering	Real Estate Appraising
Professional Nursing	

Professional service providers may not be selected based on competitive bids, but rather on basis of demonstrated competence and qualifications to perform the service and for a fair and reasonable price.

PROCEDURE
Departments must use the Exclusive Acquisition Justification forms on Miner Mall. All information on the forms must be completed or the form and corresponding requisition will be returned. Forms will route electronically for all required approvals.

PREPAYMENT REQUESTS

The following information is for the issuance of Prepayments in the event that a vendor will not accept a purchase order or procurement card, the end-user will process a prepayment request via a purchase requisition document in Miner Mall by indicating "prepayment" in the **comment section** of the requisition.

The Purchasing Department will notify the Accounts Payable Department on all pre-payment request with:

- Purchase order number.
- Prepayment dollar amount (for partial payments, state the vendor terms for the remaining balance)
- Supporting documentation (quotes, invoice, registration forms, entertainment expense form etc.)

TEX. GOV'T CODE ANN. §2113.001, TEX. GOV'T CODE ANN. §§ 2155.383, 2155.386.

DIRECT PAY FORM

The Miner Mall Direct Pay Form is used to request a check, payable to a vendor, for items that may not require a Purchase Order.

This form should be used for simple payment transactions that can be processed in an expedited manner or are not subject to state purchasing regulations.

The Direct Pay Form can be used for the following payment types.

- Governmental/Public & Educational Entities
- Intercollegiate Athletic Tournaments/Events
- Licenses excluding Software
- Lodging/Catering/Meeting Rooms
- Mailing Services
- Membership/Association Dues/Registration
- Non-Library Books
- Referees/Officials/Umpires
- Royalty Payment
- Utility Payment

When using the Form, documentation must be attached to the form for the Accounts Payable department to process payment.

SECTION 8 - REQUEST FOR PROPOSAL

Request for Proposal (RFP) – Purchase Value greater than $50,000.00; based on factors in addition to price and delivery.

GUIDELINES

When the value exceeds the amount of $50k in goods/services, a formal solicitation process maybe required. These guidelines apply to the RFP solicitation process:

- An RFP is a solicitation method used when the best value criteria, in addition to price and delivery are considered deciding factors in decision making to which proposer should be awarded the contract.
- When best value criteria is used, it is clearly identified in the RFP. All criteria weighted must be approved by the Purchasing Department and primary stakeholder before the RPF is publicized. Best value criteria may include but is not limited to:
  - Installation costs
  - Life cycle costs
  - Quality and reliability of the goods/services
  - Delivery terms
  - Indicators of probable vendor performance such as past vendor performance, financial
  - resources and/or ability to perform; capability and responsibility; and ability to provide reliable maintenance agreements and support
  - Employee training costs associated with a purchase
  - Effect of purchase or agency productivity
  - Other factors determining best value for the University of a particular purchase
  - RFP opportunities are sent to reliable vendors who can provide goods/services. RFP are posted on websites, such as, UTEP Sourcing Manager, and ESBD (Electronic State Business Daily).
  - Terms and conditions are included in the RFP. Proposers are allowed to note exceptions to terms and conditions. NOTE: The University may disqualify vendor for not accepting posted terms on the RFP

PROCEDURE

The establishment of the Evaluation Team

- The department identifies end users and subject matter experts to serve as part of the evaluation team; the primary stakeholder with the assistance of the Purchasing Agent, provides a list of potential committee members before the RFP is publicized.
- The Purchasing Agent disseminates and collects Non-Disclosure/Conflict of Interest statements

from all team members.

- Both, the Purchasing Agent, and the evaluation team develop the scope of work and a list of questions to assist in the process.

The Purchasing Agent prepares the RFP document which includes:

- Background information on the purpose of the solicitation
- Provides a detailed scope of work
- List of questions for proposers
- Execution of Offer
- Instructions on how to submit proposals
- Instructions on completion and submission of VetHUB HSP must be included
- A schedule, including:
- If applicable, date of pre-proposal conference
- Date of submission of written questions from proposers to the University
- Deadline proposal submission
- Complete name, telephone number, and email address of the University contact
- Terms and conditions

PROCESS

- The RFP is posted for 21 days, minimum. The need for a pre-proposal or VetHUB HSP may add time to the RFP posting.
- Proposals are held by the Purchasing Agent until the proposal date of submission. If an VetHUB HSP is required, VetHUB staff will review. If deemed not acceptable, the proposal will not be opened.
- Proposers are allowed to attend bid openings. For time and date, the proposer may contact the solicitation's designated Purchasing Agent.
- Each evaluation team member will review proposals, score the RFP criteria, and submit scores to the Purchasing Agent.
- The Purchasing Agent will compile all scores.
- The Purchasing Agent will review scores and make a recommendation for award.
- An award letter is then sent to the proposer contingent on the negotiation of the contract. Non-award letters are sent to all unsuccessful proposers.
- The awards are posted on the Texas Comptroller of Public Accounts, ESBD website.
- The Purchasing Agent issues a purchase order to the vendor.

SECTION 9 – ORDERS OVER $100,000

It is the intent of this procedure to establish a uniform method for processing requisitions with an anticipated total value of $100,000 or greater in accordance with State, TPASS and UT System rules and regulations.

GUIDELINES

All requests for products and/or services, where the anticipated total value equals or exceeds $100,000, shall be reviewed by the Purchasing Agent and VetHUB staff and shall receive written pre-approval prior to solicitation and award.

No bid or RFP response that exceeds $100,000 can be accepted or evaluated without the written consent of VetHUB staff or designated representative.

For detailed information on the appropriate VetHUB requirements and/or documents, consult VetHUB staff or the website at https://www.utep.edu/purchasing-and-general-services/pgs-departments/hub-program/ .

EXCEPTIONS

The following purchase types shall be processed in accordance with applicable policies and procedures:

- Construction Services
- Establishment of Committed Contracts
- Procurements from Committed Contracts
- Procurements from Non-Committed Contracts

SECTION 10 -INFORMATION TECHNOLOGY

This procedure is issued to establish effective guidelines for the purchase of Information Technology products and services consistent with best value principles, applicable laws and regulations, and best industry practices.

GUIDELINES

All requests for Information Technology goods shall be processed in accordance with Best- Value Procurement and all Purchase Orders and contracts/agreements shall include the following clause:

Access by Individuals with Disabilities. Contractor represents and warrants ("EIR Accessibility Warranty") that the electronic and information resources and all associated information, documentation, and support that it provides to the University under this Agreement (collectively, the "EIRs") comply with the applicable requirements set forth in Title 1, Chapter 213, Rule §213.41 of the *Texas Administrative Code* and Title 1, Chapter 206, Rule §206.70 of the *Texas Administrative Code* (as authorized by Chapter 2054, Subchapter M of the *Texas Government Code*.) To the extent Contractor becomes aware that the EIRs, or any portion thereof, do not comply with the EIR Accessibility Warranty, then Contractor represents and warrants that it will, at no cost to University, either (1) perform all necessary remediation to make the EIRs satisfy the EIR Accessibility Warranty or (2) replace the EIRs with new EIRs that satisfy the EIR Accessibility Warranty. If Contractor is unable to do so, then the University may terminate this Agreement and Contractor will refund to the University all amounts the University has paid under this Agreement within thirty (30) days after the termination date.

All requests for Information Technology, where the anticipated total value exceeds $100,000, shall be reviewed by the Purchasing Agent and VetHUB staff prior to solicitation and award.

All requests for Information Technology, where the anticipated total value exceeds $1,000,000, must be approved by the State of Texas' Department of Information Resources prior to solicitation and award.

SOFTWARE LICENSING

For all procurements of software that require a separate software license to be executed (i.e. non-shrink wrap software; MS Windows, MS Office, etc.) shall be in the form prescribed by UT System Office of General Counsel and be reviewed, approved and executed by the Purchasing Agent.

RISK ASSESSMENT OF THIRD-PARTY SERVICE PROVIDERS

The university follows UTS165 Information Resources Use and Security policy in reference to the risk assessment of third-party providers.

SECTION 11 – CONSULTING SERVICES

This procedure is issued to establish effective guidelines for the purchase of Consulting Services consistent with best value principles, applicable laws and regulations, and best industry practices.

DEFINITION

The Texas Government Code, Section 2254.021, defines consulting services as the service of studying or advising a state entity under a contract that does not involve the traditional relationship of employer and employee.

DETERMINING CONSULTING SERVICES

To recognize whether a would-be consultant is studying or advising as opposed to doing something else, is to look at the deliverable involved. A true consultant delivers information or provides assistance that enables the university to take some course of action. If the information provided enables the would-be consultant to take some course of action on the university's behalf which is itself not a consulting service (such as developing software) then this would more than likely not be a true consultant contract within the meaning of the code.

PROCESSING CONSULTING AGREEMENTS

All requests for Consulting Services shall be processed in accordance with Best-Value Procurement except for the following conditions:

- All Consulting Services shall be contracted for, after award, via a Consulting Agreement between UTEP and the Consultant.
- The Consulting Agreement shall be in the form prescribed by UT System Office of General Counsel.
- The Consulting Agreement shall be reviewed, approved and executed by the Vice President of Business Affairs or the Purchasing Agent.
- All requests for Consulting Services, where the anticipated total value exceeds $100,000 shall be reviewed by the Purchasing Agent and VetHUB staff prior to solicitation and Award.

SECTION 12 – PROFESSIONAL SERVICES

This procedure is issued to establish effective guidelines for the purchase of Professional Services consistent with applicable laws and regulations.

CATEGORIES OF PROFESSIONAL SERVICES

Professional Services mean services in the following categories:

- Accounting
- Architecture
- Landscape Architecture
- Land Surveying
- Medicine
- Optometry
- Professional Engineering
- Real Estate Appraising
- Professional Nursing

Or persons in connection with professional employment or practice who are licensed as:

- Certified Public Accountant
- Architect
- Landscape Architect
- Land Surveyor
- Physician, including a Surgeon
- Optometrist
- Professional Engineer
- State Certified or State Licensed Real Estate Appraiser
- Registered Nurse

SELECTION OF VENDOR (EXCEPT FOR ARCHITECTS, ENGINEERS, or SURVEYORS)

In accordance with Texas Government Code, Section 2254, the selection of a vendor providing professional services cannot be made on a competitive basis.

The selection and award of a Vendor of professional services shall be made:

- On the basis of demonstrated competence and qualifications to perform the services; and fair and reasonable price.
- The professional fees under the contract:
- Must be consistent with and not higher than the recommended practices and fees published by the applicable professional associations; and
- may not exceed any maximum provided by law.

SELECTION OF ARCHITECTS, ENGINEERS OR SURVEYORS

In accordance with Texas Government Code, Section 2254.004, procuring the services of a vendor proving architectural, engineering, or land surveying services, requires the university to:

- Select the most highly qualified vendor of those services on the basis of demonstrated competence and qualifications; and
- Attempt to negotiate with that vendor an agreement at a fair and reasonable price.

If a satisfactory agreement cannot be negotiated with the most highly qualified vendor:

- Formally end negotiations with that vendor;
- Select the next most highly qualified vendor; and
- Attempt to negotiate an agreement with that vendor at a fair and reasonable price.

The University shall continue the process described above to select and negotiate with vendors until an agreement is entered into.

PROFESSIONAL SERVICES REQUEST FORM

To process a Professional Services form:

- Initiate your purchase requisition via Miner Mall.
- Complete the electronic Professional Services Form available in Miner Mall regardless of the total cost of services.
- Include and attach any of the following for Purchasing to review:
  - Quotes
  - Service agreements
  - Engagement letters
  - Letters of Intent
- Submit the Electronic Form so that it may route to the appropriate department Approvers.
- Form will then route electronically to the Purchasing Department for final approval.

PROFESSIONAL SERVICES AGREEMENT

All Professional Services shall be procured via a Professional Services Agreement between the University and the vendor.

The Professional Services Agreement shall be in the form prescribed by UT System's Office of

General Counsel and be reviewed, approved, and executed by the Purchasing Agent.

All Requests for Professional Services, where the anticipated total value exceeds $100,000, shall be reviewed by the Purchasing Agent and VetHUB staff prior to selection and award.

SECTION 13 – ESTABLISHMENT OF COMMITTED CONTRACTS

This procedure is issued to establish a uniform method for entering into Committed Contracts/Agreements, which include Institutional and Committed Group Purchasing Organization (GPO) Contracts/Agreements.

INSTITUTIONAL CONTRACTS/AGREEMENTS

Institutional Contracts/Agreements must be established in accordance with Best-Value Procurement.

COMMITTED GROUP PURCHASING ORGANIZATION (GPO) CONTRACT/AGREEMENT

The terms, conditions and requirements of a GPO Contract/Agreement may be negotiated between all three parties (i.e., UTEP, GPO and Vendor).

If a "Commitment Letter" is required, it must be approved and signed by the Purchasing Agent, then an original copy of the commitment letter is forwarded to the GPO, vendor and the Purchasing Agent. Orders may then be placed against UTEP's commitment to the GPO Contract/Agreement with the vendor.

All Commitments, where the anticipated total value exceeds $100,000, shall be reviewed by the Purchasing Agent and VetHUB staff prior to commitment.

PLACEMENT OF ORDERS UTILIZING A COMMITTED CONTRACT/AGREEMENT

Placement of orders utilizing a Committed Contract/Agreement shall be processed in accordance with Section 16 (Procurements from Committed Contracts).

SECTION 14 – GROUP PURCHASING ORGANIZATIONS (GPO)

The University utilizes certain GPOs for the sole of obtaining best value for the university. The GPOs approved for use are listed on the UT System website at https://www.utsystem.edu/offices/business-affairs/group-purchasing-organization-gpo-accreditation-program .

Sales representatives whose companies have current contracts within a GPO may provide information to Faculty & Staff on the specifics for the contracts. The contract type and number must be included on all sales quotes. Additionally, Purchasing Agents familiar with GPO contracts may provide assistance to Faculty & Staff in purchasing goods/services.

SECTION 15 – REPORTING

On a monthly basis all PO's, contracts, and RFP's will be posted on the Purchasing website per Senate Bill 20 requirements.

PO TRANSPARENCY REPORTING

- Date
- PO #
- Vendor Name
- PO Total
- Contract Term (Length)
- Commodity and Service Purchased
- Method of Procurement
- Justification for Procurement Method

CONTRACT TRANSPARENCY REPORTING

- Contract No.
- Vendor Name
- Contract Value
- Awarded Date
- Expiration Date
- Commodity and Service Purchased
- Justification for Procurement Method

RFP TRANPSARENCY REPORTING

- Reporting of all contracts regardless of value and funding source
- Start Date
- End Date
- RFP/Contract Name
- Summary

LBB REPORTING

The following PO's and contracts which will be reported to the LBB (Legislative Budget Board) (subject to applicable thresholds) under Appropriations Bill Rider Article IX, Sections 7.04 and 7.12.

- All Funding Sources
- Professional Services exceeding $14K
- Major information Systems exceeding $1M
- Contracts exceeding $10M (competitive)
- Contracts exceeding $1M (non-competitive)
- Purchases exceeding $50K

SECTION 16 – FOREIGN PURCHASES AND CUSTOMS REQUIRMENTS

FOREIGN PURCHASES

Before issuing a purchase order, a department must determine the currency to be used to make the purchase and the foreign exchange rate determined when payment is not made in U.S. dollars.

OANDA is the most commonly online currency converter used to assist departments with exchange rates. http://www.oanda.com/currency/converter/

OAFC maintains SDN as it maintains names of individuals and organizations in which the United States prohibits from doing business with. All departments must verify companies are not in the SDN list.

CUSTOMS REQUIREMENTS

Purchasing products manufactured outside the United States requires clearance by U.S. Customs and Border Protection upon entry into the U.S. Information can be found on the U.S. Customs and Border Protection website.

UTEP retains the services of a U.S. Customs Broker to assist with customs requirements. The Purchasing Agents can provide contact information to the departments.

Products imported from foreign countries are subject to a variety of duties, fees, and taxes. The departments making the purchases are responsible for all associated additional charges. To avoid, fines, fees, or penalties for paying incorrect purchase amounts, the Purchasing Agent strongly recommends departments work with a U.S. Customs Broker.

FOREIGN ADVERSERIAL COUNTRIES UNDER EXECUTIVE ORDER GA-48

Pursuant to Executive Order GA-48 of the Governor of Texas effective November 19, 2024, vendors must certify that it and, if applicable, any of its holding companies or subsidiaries, are not:

a. Listed in Section 889 of the 2019 National Defense Authorization Act (NDAA); or
b. Listed in Section 1260H of the 2021 NDAA; or
c. Owned by the government of a country on the U.S. Department of Commerce's foreign adversaries list under 15 C.F.R. § 791.4; or
d. Controlled by any governing or regulatory body located in a country on the U.S. Department of Commerce's foreign adversaries list under 15 C.F.R. § 791.4.

SECTION 17 – TRIAL, SAMPLE, & EVALUATION PRODUCTS

This procedure is issued to establish effective guidelines to enable Vendors to bring in products for trials and/or evaluation at no charge.

GUIDELINES

Departmental personnel are responsible for completing and having the vendor sign the UTEP Vendor Release Form which can be attained by contacting the Contract Administrator. If the products will be shipped to UTEP, the Department will also contact Central Receiving at (915)747-7149 to plan for delivery. The vendor should identify all containers as "Trial" or "Loan".

Upon receipt of the complete form, Contract Administration shall maintain a file at the end of the trial period to ensure that the trial or evaluation products have been returned to the vendor.

Once the trial or evaluation period is completed and the products have been returned to the vendor, the Contract Administrator shall initial the form as completed then file the form electronically.

SECTION 18 – USED EQUIPMENT

This procedure is issued to establish effective guidelines for the procurement of used or demonstrator equipment.

PURCHASING USED EQUIPMENT

On occasion, it may be necessary or advantageous to purchase used or demonstrator equipment and supplies due to the inability to secure new equipment, lack of adequate funds for new equipment, or the used equipment will satisfy the University's need at a substantial savings.

If purchasing used or demonstrator equipment, the Purchasing Agent must:

- Obtain a minimum of three quotes (two from certified VetHUB vendors, if available) if the purchase amount is $15,000 or greater.
- Regardless of the purchase amount, obtain a letter or signed statement from the vendor guaranteeing the quality and condition of the used equipment or supplies.
- Regardless of the purchase amount, obtain a letter from an authorized person connected with the vendor that states the equipment or supplies have been personally examined and describes the condition and value or the item(s).

SECTION 19 - RECORDS DOCUMENTATION AND RETENTION SCHEDULE

To comply with the state retention guidelines and to better control the documentation and storage of records in Purchasing, the following Record Retention Schedule and Documentation Guidelines has been established.

DOCUMENTATION POLICY

Purchase Orders

The Purchase Order file in Miner Mall shall be prepared by the Buyer and if applicable consist of:

- Purchase Order
- Copy of all Submitted Quotations or Written Bids/RFPs, if applicable
- Appropriate Justification (e.g., emergency, sole source, professional services), if applicable
- Bidders list, if applicable
- VetHUB Good Faith & Effort Documentation (Orders $100,000 or more)
- Award Recommendation, if applicable
- Department (User) Review/Approval Letter or Evaluation Forms, if applicable
- Best Value Justification if applicable
- Bid Tabulation and Justification for Method of Purchase
- Change Order(s), if applicable
- Miscellaneous correspondence
- Contract Administration Audits/Documentation, if applicable

Contract Files (Including Capital Equipment and Software Licenses)

The Contract File shall be prepared by the Buyer and if applicable, consist of:

- Signed Contract and/or Copy of Purchase Order
- Bidders list, if applicable
- Original response from the awarded vendor (including clarifications & revised bids/proposals)
- Copy of all responses, if applicable (including clarifications & revised bids/proposals)
- VetHUB Good Faith & Effort Documentation (Orders $100,000)
- Appropriate Justification (e.g., emergency, sole source, professional services), if applicable
- Evaluation forms
- Response Tabulation and Justification for Method of Purchase
- Award Recommendation, if applicable
- Addendum(s) to the Contract or Change Order(s), if applicable

- Miscellaneous correspondence
- Contract Administration Audits/Documentation, if applicable

RECORD RETENTION SCHEDULE POLICY

Purchasing office follows the approved records retention schedule as per the following link: https://www.utep.edu/purchasing-and-general-services/_files/docs/records-management-retention-schedule/2023/pur.pdf

EXCEPTIONS

If any litigation, claim, or audit is started before the expiration of Records Retention Schedule, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.

Any other exceptions must be in writing by formal addendum to this procedure or other formal written exception by the Purchasing Agent.

SECTION 20 - FORMAL CONTRACT ESTABLISHMENT

This procedure is issued to assist in defining contract establishment and the circumstances that may necessitate the requirement for a formal contract.

PROCUREMENT OVERVIEW

In determining the need for a formal contract, several topics must be reviewed. In general, the Contract process is much less efficient than the procedures used when issuing Purchase Orders. Purchase Orders however, may not protect the University from potential risks in the same manner as a formal contract or Agreement. In determining the need for a formal contract as opposed to a purchase order, buyers must weigh several factors such as risk, complexity, dollar amount and efficiency.

The proper procurement method must first be determined. Most contracts are established as the result of an RFP, RFQ or CSP process (which allows for negotiation) rather than from a bid. A primary rationale for establishing any contract is to finalize the actual scope of work (SOW) and terms and conditions that the contractor and University have agreed to be mutually acceptable. The bid process assumes all terms, scope and/or specifications are extremely clear in the procurement stage. Acceptance of the services or commodities resulting from a bid, as opposed to an RFP for instance, should simply be a matter of "awarding" to a vendor precisely what was stated in the bid documents. Considering these factors, a complete understanding of the contractual processes is not possible without a thorough knowledge of the RFP procedures. Purchasing Agents must familiarize themselves with the details of the RFP process listed in Section 8. A sample contract must/shall always be included with the RFP solicitation. After award and negotiations, a signed contract will be set forth in place.

Financial Risks: The total estimated value of the procurement request must be established. Before the RFP, RFQ or CSP is advertised. Do not proceed until this amount is determined. Keep in mind the initial purchase request may not realistically portray the true amount of the contract. Delegation policies may come into play once this amount is confirmed. All procurements must follow the delegation authorities and procedures listed in Section 3. Individual procurements should be reviewed for specific delegation policies (i.e. Real Property and Space Leases). NOTE: When establishing the monetary value, the full estimate amount of the life of the contract, "including all renewals and extensions," must be considered rather than the financial commitment per fiscal year.

GENERAL GUIDELINES

The following circumstances and situations are presented as examples of when a formal contract should be considered. These examples are presented as guidelines and do not encompass all

circumstances when a contract should be considered nor does every situation listed necessarily merit the formation of a contract. The multiple factors listed must be considered in making this determination.

Purchasing Agents must weigh the complexity, risk, monetary value, and efficiency of these situations. For instance, if an RFP is issued in which the same service will routinely be requested, the SOW remains relatively constant, and all relevant terms have been established within the RFP, a notice of award may be sufficient.

GUIDELINES NECESSITATING POSSIBLE CONTRACTS

- If the procurement is of the "Job Order" variety in which multiple purchase orders or contracts will be issued over a period of time resulting from the same solicitation.
- If the complexity of the procurement is such that a purchase order will not sufficiently protect the University from the potential risks involved (i.e. orders involving direct student interaction, contract workforce, term contracts, procurements involving safety and security, etc.).
- Procurements involving extensive and prolonged use of campus facilities by the contractor (i.e. training-style contracts).
- Solicitations in which the specifics of the SOW still require clarification even upon the issuance of a Best and Final Offer (BAFO). Job-Order style contracts usually fit this example.
- Procurements exceeding the delegated authority of the Purchasing Office and/or the University.
- Revenue-generating contracts.
- Auxiliary Services (i.e. Bookstore, Food Services).
- Space Leases.
- Sole Source Purchases
- Contracts provided by Suppliers. These contracts are reviewed by Contract Administration and brought into compliance with UTEP, UT System and State of Texas standards.

PROCESS PROCEDURES

If it is deemed that a purchase order, Notice of Award and/or Notice to Proceed is sufficient and a contract is not necessary, the award must reference the terms and SOW in the RFP solicitation. Specific terms that need to be addressed can be added as comments in the Purchase Order.

SECTION 21 – CONTRACT ADMINISTRATION FOR FORMAL CONTRACTS

This procedure is established to assist in the processing of projects which may result in the issuance of a formalized contract or agreement. The provisions of this procedure will also provide guidance for other methods of purchase, specifically general service procurements.

GENERAL GUIDELINES AND PROCUREMENT OVERVIEW

If it is suspected that a project may result in a contract/agreement, procurement staff and those involved in the contract review must be aware of the following processes:

- Assurance must be taken that all procurement regulations are met.
- Development of service requirements must be coordinated during the procurement stage and all ambiguous provisions must be clarified prior to the initiation of contracted services. Sole source/proprietary requests should be rare occurrences and reviewed with utmost scrutiny. If a sole source method is followed, all documentation and justification are required upon submission for signature. The result of an RFP process is a contract/agreement enforceable by law.
- The form of payment contract must be established and finalized at the procurement stage.
- The appropriate contract/agreement classification (e.g. fixed-price, unit price, time & materials, cost-plus, turn-key, labor hour, maximum guarantee) must be initiated dependent on the maximum value and/or benefit obtained by the University. Mandatory performance indicators can be a key in determining method of contract. Progress payments may be used when performance milestones are met.
- The contract/agreement term, "initial start date, expiration date, and options to renewal," including cancellations and termination must be evaluated to assure best value is obtained.
- A standard UT System contract/agreement template should always be selected whenever possible.
- The sample contract/agreement must/shall be included in the solicitation phase.

CONTRACT ADMINISTRATION

Upon execution of a contract or agreement by both parties,

- Procurement Staff will provide contract/agreement, performance bonds, proof of insurance and all supporting solicitation documents to Contract Administrator.
- Contract/agreement check list is completed and made part of the contract file.
- Contract/agreement information is entered into contract database for tracking purposes.
- Contract Administrator prepares contract amendments and obtains approval and signature from the Purchasing Agent when changes or renewals to contract terms are negotiated.

- End users are periodically contacted to measure the performance of contracted vendors. Any deficiencies are brought to the attention of the Contractor and a solution is obtained and documented.

PROCEDURES FOR REVIEW AND APPROVAL OF BUSINESS CONTRACTS

On occasion, a vendor may require a business contract/agreement to be executed prior to services being rendered. The following steps should be taken for review, approval, and execution by the Purchasing Office:

Submit the contract/agreement along with a brief description of the proposed services, estimated amount of contract, departmental contact information and any other relevant information that will assist the Purchasing Office in the contract review. Please note, any service contract exceeding $50k must have been processed using a competitive solicitation process.

The contract/agreement will be reviewed to ensure the University is at minimal risk and that the contract/agreement complies with UTEP and UT System policies and UT System Board of Regent rules.

Any contract/agreement considered to be a Special Procedure Contract as specified by the Office of General Counsel (OGC) or that exceeds the University's delegated amount as indicated in Section 3, will require review by OGC and may delay the approval process.

Once the contract/agreement has been reviewed and approved, the contract/agreement will be executed by the Purchasing Agent and sent to the contractor for execution.

Upon receipt of a fully executed contract, one copy will be retained by the Purchasing Office, one copy will be retained by the contractor, and if applicable one copy will be made available to the requesting department.

SECTION 22 - VETERAN HEROES UNITED IN BUSINESS (VetHUB)

This procedure establishes guidelines to increase the utilization of Veteran Heroes United in Business vendors (VetHub) firms in the award of contracts and procurements for goods and services consistent with rules, regulations and goals established by UT System, Texas Procurement and Support Services (TPASS) and UTEP.

GOOD FAITH EFFORT RESPONSIBILITIES

Each Purchasing Agent shall encourage the participation and utilization of VetHUB firms in advertising, competing and awarding of contracts and procurements. In addition, VetHUB staff shall make outreach efforts to recruit, establish and disseminate information to VetHUB firms; to include, but not limited to:

- Attend VetHUB related Trade Shows.
- Meet with VetHUB firms.
- Assist VetHUB firms in completing VetHUB Subcontracting Plans (HSP).

BID SOLICITATION

Consistent with Methods of Procurement, Section 7, each Purchasing Agent shall solicit bids/quotes from qualified VetHUB firms per the requirements prescribed below:

Less than $15,000.00	Open Market	Non-bid, award to best source
$15,000.00 to $49,999	Informal	Purchasing Agent must solicit (3) quotes, two of which must be VetHUBs if available
$50,000.00 or greater	Formal	A VetHUB Subcontracting Plan (HSP) is required if expected value of purchase exceeds $100k

ORDERS OVER $100,000

In accordance with Government Code, Section 2161, and Texas Administrative Code, Section 111.14, all orders with an estimated purchase price exceeding $100,000, require the submission of a VetHUB subcontracting plan.

SECTION 23 – VETHUB SUBCONTRACTING

This procedure establishes guidelines to increase the utilization of Veteran heroes United in Business (VetHUB) firms in the award of Subcontracts for the procurement of goods and services consistent with rules and regulations established by UT System, Texas Procurement and Support Services (TPASS) and UTEP.

SUBCONTRACTING REQUIREMENTS

In accordance with Government Code, Section 2161, and Texas Administrative Code, Section 111.14, for all orders with an estimated total purchase price of $100,000 or more, the Purchasing Agent in consultation with the VetHUB staff shall determine whether a Subcontracting opportunity exists.

SUBCONTRACTING DECLARATION

If a Subcontracting opportunity exists, the solicitation must include the VetHUB requirement in the solicitation.

A listing of Texas certified VetHUBs can be obtained from the Texas Procurement and Support Services' Centralized Master Bidders List (CMBL).

NON-SUBCONTRACTING DECLARATION

If a Subcontracting opportunity does not exist, the solicitation must include statement that subcontracting opportunities are not probable under the solicitation.

PRIOR EVALUATION and AWARD REVIEW

Prior to evaluation and award, all solicitations with a total value of $100,000 or greater, where a Subcontracting opportunity was determined, shall be reviewed by the VetHUB staff. VetHUB staff shall determine whether the bid/proposal complies with all VetHUB requirements. If a bid/proposal does not comply with the VetHUB requirements, it shall be disqualified from consideration or award.

SECTION 24 - CHANGE ORDERS

This procedure is issued to provide university departments with guidance when revisions are required to a purchase order which has been final approved.

When revisions are required on a purchase order, a change order request is initiated by the department via the Change Order Request form in Miner Mall.

Invoicing and receipt statuses will be reviewed by the Purchasing Agent prior to a change being processed.

Change orders should only be used for the following:

- To cancel a purchase order
- To cancel a line item
- To modify a line item (non-catalog items only)
- To change the funding source
- To close a purchase order
- To add additional funding due to unforeseen circumstances

Supporting documentation should be attached to each change request form.

The Purchasing Office has sole authority to make changes to existing purchase orders without requesting a change order from the originating department.

Change requests which exceed 10% of the original Purchase Order must include documentation as to why the additional costs could not have been anticipated.

SECTION 25 - COMPUTER ACQUISITIONS

UTEP desktop and laptop computer standards are evaluated by college and departmental technology representatives each year. Specifications are evaluated and revised to ensure they meet the needs of most campus users. Standardizing computer equipment increases efficiency and reduces the total cost of ownership across campus. The standards are for computer purchases for offices, computer labs, and other locations.

BASIC SERVICE

- Choose from Windows or Mac desktops and laptops.
- Standard software includes MS Office, productivity software, and security.
- Reduced pricing negotiated at the UT System level.
- Warranty repairs handled by Technology Support at no cost to departments.
- Purchased standards may be modified to meet specific needs (memory, storage, monitor, etc.)

STANDARDS REVIEW

The configurations available on Miner Mall shall be managed jointly by the UTEP Purchasing Department and the UTEP Information Technology Department. Both departments will mutually review and update the standard configurations and pricing when new hardware and software is released by vendors, or when University requirements change.

PURCHASING

All standard computers are available and must be ordered through Miner Mall . Log in and click on the Dell or Apple logo to see options and order computers. Some modifications may be made in Miner Mall (memory, storage, larger monitor, etc.) for Dell computers. Modifications for Apple require a quote which you can request by entering a service request at servicedesk.utep.edu .

Miner Mall orders take approximately 1-2 business days to process before the purchase order is mailed to the vendor.

If a standard computer does not meet your requirements, you may order a non-standard computer via the Non-standard computer Requisition in Miner Mall. Complete the form, attach your quote, and submit it for approval.

OPERATING PLAN

Computers will be delivered pre-configured with necessary software and settings to UTEP Central

Receiving. Once the computers have been received and checked into inventory, they will be delivered to the requesting department. Information Technology maybe contacted to setup and install any additional software required in the computers.

Once computers are delivered to the end user, the computer shall not be reconfigured or rebuilt by any individual that is not employed by the Information Technology Department.

All computers governed under this policy shall be members of the “Miners” domain. This domain membership shall not be changed by any individual that is not employed by the Information Technology Department.

GRANT FUNDED EQUIPMENT

Grants which are written on behalf of the University which require the purchase of computers shall adhere to this policy. Grant-funded equipment must be supported, and eventually becomes the property of the University at termination of the grant; therefore, it is essential that this equipment follow the same standard set forth herein.

SECTION 26 – TRADE IN DISCOUNTS

The University of Texas at El Paso (UTEP) is committed to the responsible use of and the orderly transfer of equipment to UTEP and from UTEP to external entities. UTEP adheres to University of Texas System guidelines and state and federal regulations regarding the transfer of supplies and equipment. For the purposes of this section, "equipment" refers only to capital and controlled equipment (refer to UTEP Inventory Management Policies and Procedures for definitions of capital and controlled equipment).

All equipment trades must be final approved by the VPBA office. The requestor must submit a memorandum to the VPBA office, through the department chair, Dean or VP, and the VP of Research, if necessary.

The memorandum for approval should list the equipment to be traded and should include the description, inventory tag number, acquisition cost and account number original charged.

The equipment shall not be removed from UTEP until all approvals have been obtained and the inventory tags have been removed by Inventory.