**Low Value Purchase Orders**

**Summary:** The Purchase Requisition is used to order equipment, supplies or services directly from the vendor and is completed at the departmental level: give the PO number to the vendor. It is an authorization to commit departmental funds.

**Low Value Purchase Orders are used:**
- For total orders under $2,500, per vendor, per day, including tax and shipping
- Any services must be on the 'Commodities Permitted' list
- Departmental Buyer has completed PAL training and has an assigned Buyer Code
- Departmental Buyer does not have PALCard
- Vendor does not accept Visa

**PAL Action Codes**

<table>
<thead>
<tr>
<th>Code</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Add</td>
</tr>
<tr>
<td>L</td>
<td>List</td>
</tr>
<tr>
<td>C</td>
<td>Change</td>
</tr>
<tr>
<td>D</td>
<td>Delete</td>
</tr>
</tbody>
</table>

**Low Value Transaction Codes**

**P31 - Vendor Selection**
- Is used to search for and select a vendor: it displays multiple vendors alphabetically by “Vendor Name” and allows you to select the desired record

**U10 - Low Value Header**
- Allows authorized users to add and edit requisition information to create an on-line requisition: it must precede entry of any requisition line items.

**P11 - Low Value Line Items**
- Allows authorized users to add to and edit specific line items in an established requisition

**P19 - Purchase Order Inquiry**
- Provides complete information about a purchase order

**P13 - Low Value Authorization**
- Allows authorized users to authorize a requisition and print a vendor copy: all prior approvals must be obtained before completing this screen
Vendor Selection (P31)

Synopsis of Vendor selection criteria according to Senate Bill 1467 (SB 1467):

• Employee Vendors: SB 1467 prohibits University employees, or entities in which the employee has a financial interest, from contracting with any University department to provide goods or services. University employees with teaching or research responsibilities are exempted from this provision of SB 1467 but are still subject to University Conflict of Interest Code for employee-vendors.

• Successor Contracts: Consultants who have performed work for the University cannot participate on subsequent projects relating to their findings. If you are planning to hire a consultant or independent contractor with the expectation that they could conceivably perform subsequent work related to their findings, refer to the document named Independent Contractor, Consultant or Employee?

• Contracting with Former UC Employees: SB 1467 contains two restrictions on contracting with former employees: - A former University employee cannot enter into a contract for two years from the date of separation to perform work related to contracts that were planned, negotiated, or executed by that employee. - A former University employee cannot be paid as an independent contractor for one year from the date of separation to perform work on a contract if he or she was employed by that department in a policy-making position in the same general subject area as that contract.

• Penalties: Penalties for non-compliance with the statute are serious, and may include personal criminal sanctions and/or monetary damages. Resources: For additional information on SB 1467, please refer to New Restrictions for Contracting with Independent Contractors/Consultants

• Contact: Harry Gunther
To Display Vendor Records:
- Go to the Vendor Selection transaction (P31)
- Enter the vendor name in the Vendor Name field
- Press <Enter> to see the data: the system displays vendors by name, number and address beginning with the vendor closest to the name entered
- Scroll backward and forward by using the <F7> and <F8> keys

Select and Move a Vendor Number and Name into the Next Transaction:
- Enter the transaction code for the appropriate transaction screen in the Next txn field adjoining the selected vendor
- Press <Enter> to pull the selected vendor into the next transaction
### Low Value Header (U10)

#### Fill in Header screen
- Use appropriate Action Code
- Use <F1> key on first space of each field for a description/definition
- Ensure your Delivery Location is correct. Use the F4 Value Prompt to check additional detail or the DLN, Delivery Location Inquiry, transaction to see full detail. To make changes to a Delivery Location address, contact Purchasing, (949) 824-6516.
- Press <enter> to update and save
- Write down the assigned requisition number

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 digit Dept Code</td>
<td>_0302 _</td>
</tr>
<tr>
<td>Class Code</td>
<td><em>L</em> 00</td>
</tr>
<tr>
<td>6 digit Requisition #</td>
<td>_<strong>005896</strong></td>
</tr>
</tbody>
</table>

If HV or LV, POC field
Navigate to the Line Item screen

**Low Value Line Item (P11)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>P.o. #.....</td>
<td></td>
</tr>
<tr>
<td>Vendor #...</td>
<td></td>
</tr>
<tr>
<td>Line item #:</td>
<td>Line item code............:__</td>
</tr>
<tr>
<td>Quantity...</td>
<td>Unit of measure.......:__</td>
</tr>
<tr>
<td>Catalog #:</td>
<td>Cat./Model/Part(C/M/P): __</td>
</tr>
<tr>
<td>Comm code...</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td></td>
</tr>
<tr>
<td>Comment:</td>
<td></td>
</tr>
<tr>
<td>Seq:</td>
<td></td>
</tr>
<tr>
<td>Unit price.:</td>
<td>Extended line amt: ___________________________</td>
</tr>
<tr>
<td>Tax code......</td>
<td>Tax exempt reason: __ Tax rate: __</td>
</tr>
<tr>
<td>Delivery date:</td>
<td>Discount factor...: __</td>
</tr>
<tr>
<td>Loc: _ Account:</td>
<td>CC.: __ Fund.: __ Project.: __</td>
</tr>
<tr>
<td>Sub/Object:</td>
<td>__ / __ Source: ______</td>
</tr>
<tr>
<td>Change order...</td>
<td></td>
</tr>
</tbody>
</table>
| Next transaction P11   | Security Status: _______________________________
| F1=Help F2=Next txn F3=Exit F4=Prompt F5= F6=Change sys F7= F8= F9=Tab ntxn F10= F11= F12=Main menu

Fill in Line Item screen
- Line Item Code field:
  - MAT - Taxable Line Item
  - MAS - Taxable and Non-Taxable Line Item
  - SVC - Service (non-taxable)
- Use <F1> key on first space of each field for a description/definition
- Press <Enter> to update and save
For additional lines:
  • Press <F2> to clear screen
  • Press <Enter> after each line screen is complete to save data

For additional comment lines:
  • Note the Seq: numbers to the right of each comment line
  • <F9> to go to Next transaction field
  • Type Extra Comments transaction code (U08)
  • Press <F2> to pull it in: go to (insert link) for U08 directions

Refer to Equipment Management threshold .

Navigate to the P.O. Inquiry screen
  • <F9> to move cursor to next transaction field
  • Type P.O. Inquiry transaction code (P19)
  • Press <F2> to pull it in

Purchase Order Inquiry (P19)
Scroll through P.O. Inquiry using the <F8> key to verify accuracy.

Return to appropriate screen to make any changes:
- <F9> to next transaction field
- Type the desired transaction code
- Press <F2> to pull it in
- Enter <L> in the action code to list the information
  - Enter the Line Item number, if pertinent
- Press <Enter> to populate the screen
- Enter <C> in the action code, make any necessary changes
- Press <Enter> to update

Navigate to Low Value Authorization
- <F9> to move cursor to next transaction field
- Type High Value Authorization transaction code (P13)
- Press <F2> to pull it in
Low Value Authorization (P13)

To authorize:
- Ensure that all approvals have been obtained and documented
- Type authorization codes: Print Purchase Order, <P>; Authorization Code, <P>; Print vendor copy <Y>
- Press <Enter> to authorize