

From: Leigh Penn (lpenn)
Sent: Monday, October 21, 2019 10:36 AM
To: Vickie Chapman (vchapman) <vchapman@umw.edu>
Subject: RE: EO35 email to cardholders and supervisors

Below is the email that went out to UMW Finance Card holders and their supervisors.

Good afternoon UMW Finance Cardholders and Cardholder Supervisors,

To fully support the recent [Executive Order 35](#), the UMW Finance Card WORKS has been updated with additional GL segments to identify use of contracts, applicable Swam/micro quotes eVA entry when required, and/or exceptions to those requirements. Departmental buyers are already accustomed to these fields when coding Small Purchase Charge Card (SPCC) transactions. If you ever have trouble understanding which option to select for Segments 9 and 10 when allocating your transactions, your departmental buyer will be a good resource or you may contact your UMW Finance Card Program Administrator or anyone in the Procurement Services Office to assist you.

The EO35 will go into effect for the UMW Finance Card with the Oct-Nov billing cycle.

GL09: Quote or Competition Requirements	GL10: eVA Order # or SPP Exemption #
<input type="text"/>	<input type="text"/>

What Is Competition?

We use the word “competition” frequently in Procurement. But what does it mean? Competition refers to our requirements for purchasing from certain vendors or getting quotes from certain vendors before purchasing. EO35’s competition requirements are explained in more detail here: [Certified Business Quote Requirements](#).

Quick Tip: Use the Small Purchase Procedures!

To help you think through these two segments, GL09 and GL10, refer to the [University’s Small Purchase Procedure Exemption Tables](#). Each of those 3 exemption category tables are split into a combination of two requirements: quote/competition and eVA requirements.

- Category A = competition needed and eVA entry not needed.
- Category B = competition is not needed and eVA entry is needed.
- Category C = competition is not needed and eVA entry is not needed.

Remembering that these categories directly relate to the GL09/10 segments will help you with your selection.

Making your Segment Selections

Segment GL09: Quote or Competition Requirements

This segment refers to your quote/competition requirements for your purchase.

- Exempt (see comments for SPP Category #)
- On Contract (see comments)
- Over 5k - Small Purchase Procedures (see comments/attachments)
- Purchased from Govt Entity
- Under 5k - Micro Business Used
- Under 5k - Micro Quote Obtained (see comments/attachments)

For this segment there are 6 choices. Below are the choice selections and when you should use them:

1. **Exempt** – is your purchase exempt from competition/needing a micro-business quote per the University’s Small Purchase Procedures? If so, select this choice and write the SPP exemption Category Code (ex. C3) in the comments of your transaction.
2. **On Contract** – did you purchase an item or service from a vendor on contract, regardless of the vendor’s certified-business status (micro, small, etc.)? If so, select this choice and write the contract number in the comments of your transaction.
3. **Over 5k – Small Purchase Procedures** – is your purchase over \$5k but under \$100k and Procurement helped you with the procurement path, giving you a contract number starting with SPP XX-XXXX? Then select this option and write the SPP contract number (ex. SPP 20-1079) in the comments of the transaction.
4. **Purchased from Govt Entity** – did you purchase your item/service from another government agency (VCE, VIB, another institution, etc.)? Then select this choice.
5. **Under 5k – Micro Business Used** – Did you purchase your item/service from a DSBSD-Certified micro business? Then select this option.
6. **Under 5k – Micro Quote Obtained** – Did you contact a DSBSD-Certified Micro business and they either (1) couldn’t meet your needs, (2) didn’t respond to your quote request, or (3) were priced over 5% of the total cost of a non-certified business? Then select this choice and write your justification for not using a micro business in the comments of your transaction.

For most of your purchases, you will not need to worry about #3.

Segment GL10: eVA Order# or SPP Exemption #

This segment refers to the eVA requirement for your purchase.

- eVA exempt (see comments for SPP#)
- eVA required (see comments for PO#)

For this segment, there are only 2 choices:

1. **eVA exempt** – is your purchase exempt from needing eVA entry per the University’s Small Purchase Procedures? Does it fall within Category C? Then select this option and

enter the SPP category code that corresponds to your purchase in the comments of your transaction.

2. **eVA required** – does your purchase require eVA entry per the University's Small Purchase Procedures? Does it fall within Category A or B or isn't listed at all? Then select this option and include your eVA Purchase Order number in the comments of your transaction.