

WSMD Purchasing Procedure

The purpose of this document is to give staff guidance for all purchasing needs

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Supporting Document Links

- [Purchase order form](#)
- [DEC Purchasing Policy](#)
- [DEC Purchasing Procedure](#)
- [Purchasing Procedures and Accounts](#)
- [BGS Statewide Contracts](#)
- [Funding Coding Sources](#)

I. Purchasing Contacts

- Business Operations and Support Services (BOSS)
 - o All correspondence to go to anr.wsmdap@vermont.gov - For tracking purposes, do not contact BOSS through their individual emails
 - Jasmine White
 - Michelle Lavigne
 - o * **Invoice/Bill(s) go to:**
anr.wsmdap@vermont.gov or by mail
State of Vermont – DEC, WSMD
Attn: Accounts Payable,
1 National Life Drive, Davis 3
Montpelier, VT 05620-3522
- [ANR Finance Office](#)
 - o Lindsay Carey is the current contact for Federal Grants
- [ANR Central Office](#)
 - o Karen Robbins karin.robbs@state.vt.us in Admin Services is the contact for approving ANR online State Contract requests or for purchases over \$3,500 after AID approves (BOSS submits the request to Central Office)

II. Definitions

State Contract – a contract with the state to provide a service established through a Request for proposals. Only select State Contract on the PO if we have a state contract, otherwise they may be considered as a Vendor we use. See X11 below. [Link to State Contracts](#)

Vendors are set up for purchasing and billing [Link to Purchasing Accounts/ Servicing Contracts](#)

Servicing contracts that are set up with a contract and we must notify AID when these accounts are requested to be accessed. These would include microscope calibration or maintenance to lab testing equipment and analysis, servicing of boats and other equipment [Link to Purchasing Accounts/ Servicing Contracts](#)

Grants are received and managed by AID. When you request a purchase using the Grant Funds, AID also must approve that the funds are available – be sure to select on the PO that a Grant is used along with the current valid coding.

Coding is also linked is within the PO form and directs the cost to the correct source of funding.

PO is the Purchase Order form required for most purchases

Purchase Order Number – some vendors may ask for a PO#; it would be appropriate to use the document's name given by BOSS i.e., *Amazon20220407BabyBottles_Miller_PO*

CC – is the WSMD Credit Card

III. My Purchase Cost Less Than \$250

- Seek approval from your Program Manager only, these do not need BOSS approval unless unique/special - see 'Making an Approved Purchase'; Copy BOSS with a Manager Approved email along with the Purchase Order for record keeping
- If you are using **FEDERAL FUNDS**, after approval from your program manager, submit to BOSS for approval. The request will then be sent by BOSS to AID for the Grant Manager to approve to ensure the federal funds are available to support the purchase

IV. My Purchase Cost \$251 to \$500

- WSMDs BOSS Finance Unit reviews/approves (*5 business days or less*)
- If you are using **FEDERAL FUNDS**, after approval from your program manager, submit to BOSS for approval. The request will then be sent by BOSS to AID for the Grant Manager to approve to ensure the federal funds are available to support the purchase

V. My Purchase Cost \$501 to \$3499 (If the item cost is above \$501 for the single item - not the total purchase price)

- Documentation of 3 quotes is required **
- WSMDs BOSS Finance Unit reviews/approves (*5 business days or less*)
- If you are using **FEDERAL FUNDS**, after approval from your program manager, submit to BOSS for approval. The request will then be sent by BOSS to AID for the Grant Manager to approve to ensure the federal funds are available to support the purchase

VI. My Purchase Cost more than \$3500

- Documentation of 3 quotes is required**
- WSMDs BOSS Finance Unit reviews/approves (*5 business days or less*)
- Boss forwards approved request to DEC Finance Office also reviews and approves (*10 business days or less*)
- ANR Central Office reviews and coordinates with BGS to get a PO approval or goes out for formal bid (*up to 30 days*)
- If you are using **FEDERAL FUNDS**, after approval from your program manager, submit to BOSS for approval. The request will then be sent by BOSS to AID for the Grant Manager to approve to ensure the federal funds are available to support the purchase.

VII. Software or a Large Electronic Device

Anything that needs software to be installed, computers, scanners, monitors, iPads, etc.

- Software or computer-related equipment must be ordered through IT
- IT will put together a purchase request and route to WSMD BOSS for approval
- Submit a Track-It request, <https://itsupport.apps.vermont.gov/HEAT/Default.aspx>

VIII. Keyboard, Mouse, Earphones, Phone Case, thumb drive, camera

- mice, keyboards, and earphones, etc. are ok to buy from WBMason or Amazon, follow the “my purchase cost” procedure below
- PO's are not required for WB Mason general shared office supplies, submit request to BOSS via email

IX. Safety Equipment and Boots

- Personal Equipment is not provided to staff (i.e., Rain Gear)
- WSMD does provide shared gear as a division guideline (i.e., Waders, suits)
[Link to DEC Safety Footwear MEMO](#)
[Link to DEC Safety Footwear Guidance](#)
[How to obtain Safety Boots Through the DEC Safety Footwear Program](#)
[Link to DEC Health and Safety site](#)

X. Food and Beverage for a Meeting

Fill out a [Request for Billing Approval Form](#) , must have program manager and director approval, then route to Renita renita.marshall@vermont.gov for commissioner approval.

XI. Additional Requirements for Certifications, Memberships, Credentials and Licenses

- **Certification** – certifications are only to be paid for by the state if the certification is required for your job. Provide a Memo signed by Division Director (ask BOSS for templates if needed)
- **Membership** – Memberships require a Memo justifying what benefits it serves WSMD to have this membership. This Memo should be written by the employee/program seeking the membership, then routed to your program manager then to Pete for approval. The approval must have required signatures to move forward.-(ASWM; ABC; Professional Organizations/Memberships that are not a training) ALSO must fill out a PO form.
- **Credentials** – Certified floodplain managers CCFM – fill out a PO form (ASFM)
- **Boaters License registration and course** – after 1974 DOB you are required to take the boater license training. A PO is required and paid for with CC.
<https://www.boat-ed.com/vermont/>

XII. Car rentals

Rental rates vary based on the type of vehicle and the length of time being rented. Our contract covers a variety of cars (compact, standard, full size), mini vans, SUVs (small and large), pickup trucks (small and large), cargo vans, and 12 passenger vans. All rentals include unlimited mileage. Provide your name and dates of travel on the invoice. Personal credit cards will not be required from state employees when renting vehicles for official state business. Enterprise will direct bill DEC for rental charges.

[Enterprise Car Rental Information](#) -

[Hertz Corporation Rental Information](#)

- [Fleet](#)

XIII. Travel & Training

In State travel or Training

[≤\\$100/person and/or ≤\\$500 for a group](#)

- Fill out a purchase request form [WSMD PurchaseRequestTemplate.pdf](#)
 - o Provide all requested coding; the training code is the one that lines up with your program's training task profile ID; [CODING](#) would be the Class code of 51712
- Submit it for review/approval to anr.wsmdap@vermont.gov
- Once approved, sign up for your training
- Please direct them to remit invoice(s) to ANR.WSMDAP@vermont.gov: *

>\$100/person and/or >\$500 for a group

- Fill out the in-state training request form [Travel/Training/In State Training.pdf](#)
 - o Provide all requested coding; the training code is the one that lines up with your program's training task profile ID; [CODING](#) would be the Class code of 51712
- Route to your Program Manager for review/approval
- If approved at the program level, they will forward on to the Director (with the subject: 'Travel Request') for final review/approval
- Once approved, Sign up for your training, rooms, travel
- Please direct them to remit invoice(s) to ANR.WSMDAP@vermont.gov.: *

Out of State Training or Travel

- Fill out the employee travel authorization form [Travel/Training/Out Of State](#)
 - o The last page 'authorization of employee expenses to be paid by a third-party organization' only needs to be completed if the Department is being reimbursed for all or some of your expenses:
 - o Provide all requested coding; the training code is the one that lines up with your program's training task profile ID; [CODING](#) would be the Class code of 51712
 - o Once you complete the form – DO NOT SAVE IT AS ADOBE OR ANY OTHER VERSION, just click on the box to email it to you supervisor for approval.
 - o Supervisors – DO NOT SAVE IT AS ADOBE OR ANY OTHER VERSION, after you electronically sign it, just click on the box to email it to Financial Operations.
- Route to your Program Manager for review/approval
 - o If approved at the program level, they will forward on to the Director with the subject: 'Travel Request') for his final review/approval
 - o Once approved, Sign up for your training and secure lodging and airfare
 - o Direct them to remit invoice(s) to us: *
 - o Airfare: Reach out to Milne, Barre (802-479-0541); they will invoice us
 - o Hotel/Lodging: Email a copy of your approved training request form to anr.wsmdap@vermont.gov Jasmine can help you get a room booked
 - o Direct all invoices to *

In State Room Rentals

- See lodging options that provide direct billing to DEC [Lodging Options](#)
- Contact the hotel, provide them the number of rooms, people, dates, and ask them to note the billing codes (see billing tab) on the invoice if possible. Remit bill to *

XIV. Newspaper AD

- Provide the tear sheet to BOSS once received.
- Contact the area newspaper(s) about a week in advance and find out their process for posting legal notices. The ad should be posted for one day only, and

preferably be posted on a business day. Make sure you get the email address of where to send the ad to, the email can read something along these lines:

Newspaper Template

Please post the attached ad for ONE DAY ONLY in the legal section of the (Name of Newspaper) for your (date of posting) publication. Please let me know if you are not able to meet this deadline via email or phone. Please send a tear sheet and invoice once the ad has been published (either electronic or paper copy) to anr.wsmdap@vermont.gov. An order confirmation/proof is not sufficient.

XV. Quotes

** Quotes can be obtained through a written quote, catalog, or the internet. If unable to get 3 quotes, an explanation as to why it's unique or sole source is required. The \$ threshold for quotes is determined by the individual item NOT the total amount shown on the PO form. Quote needs to be comparable on all 3 quotes for the same number of items

XVI. Check for State Contract

- <https://bgs.vermont.gov/purchasing-contracting/contract-info/current>
- Items under state contract do not need quotes (unless over \$3499)
- Items on State contract are submitted using ANR Online by BOSS and purchased through-the Agency Central Office; these items include:
 - o [Business card orders](#) – Vermont Correctional Industries
 - o State envelopes – Vermont Correctional Industries
 - o Furniture; chairs – WBMason (not normal office supply online ordering)
 - o Furniture; stand-sit desk units - ie. Exterus

XVII. Completing a Purchase Request Form:

- Template form: [WSMD PurchaseRequestTemplate.pdf](#)
- Quotes: Include 3 quotes if >\$500*
- Coding link provided on the PO Form: In most cases you will want to select your program from the drop down and select either 'program default' or 'training' – if you are using special funds including federal funds you will need to select 'other funding source' and enter the coding into the 'funding codes/funding source' field (the other options auto populate for you)
- If you are using **FEDERAL FUNDS**, after approval from your program manager, submit to BOSS for approval. The request will then be sent by BOSS to AID for the Grant Manager to approve to ensure the federal funds are available to support the purchase
- Email the completed form and any supplemental information (quotes, justification, memos, etc.) to ANR.WSMDAP@vermont.gov (prefer as a PDF) and BOSS will review and sign-off

Note: purchase request forms (PO requests) are not required for the following

- WB Mason general shared office supply orders
- True Value Hardware purchases that are made in store and applied to the WSMD account; staff must send a copy of the receipt to BOSS.
- Newspaper publications of public notices
- BGS print shop & VCI orders
- Car rentals

XVIII. Making an Approved Purchase

After approval of the purchase is obtained, the purchase may be placed one of three ways (in this order of preference)

1. Direct billing or state purchasing contracts. Have the vendor email an invoice directly to anr.wsmdap@vermont.gov for prompt payment processing or mail to:

State of Vermont – DEC,
Watershed Management Division
Attn: Accounts Payable,
1 National Life Drive, Davis 3
Montpelier, VT 05620-3522

2. State purchasing card -s ee one of the DEC credit card holders to help with this
 - Jasmine White
 - Stephanie Lanphear
 - Renita Marshall
3. Employee makes the purchase and seeks reimbursement (least preferred/**last resort/emergency**) Please see the guidance provided by AID on this procedure. All resources can be found here: <https://finance.vermont.gov/employee-travel-and-expenses>
 - You will need to submit for reimbursement through the VISION expense module

XIX. Notes on making a purchase:

- [We are tax exempt \(ensure no tax is charged\) provide tax exempt certificate if requested using this link](#)
- Email BOSS a copy of the packing slip or confirmation that you received the item(s) to pay the invoice *