Preferred Vendor Trade Show

Procurement Services will be hosting a Preferred Vendor Trade Show on **November 1, 2023**, 10am-1pm, in Mustang Lounge, UCC. Many of Western’s preferred vendors will be in attendance to meet Western staff and faculty and to showcase their products and services.

Come to the show to:

⇒ Discover Western’s preferred vendors for campus-wide goods and services agreements
⇒ Meet the sales representatives and technical specialists
⇒ Learn about their products, services, and savings available through Mustang Market
⇒ Ask the Procurement Services team your questions
⇒ Enjoy refreshments and enter your name for prizes!

*Stay tuned ... More information will be available on our website and on Mustang Market soon!*

Elaine Roswell - Retirement Announcement and Celebration

After almost 43 years of tremendous service to Western, Elaine has made the decision to retire.

Elaine has been with Procurement Services her entire Western career. She started as a file clerk and after working in various capacities, she landed her current co-role as buyer for the facilities group and expert in customs and logistics.

Her dedication and contributions will be missed at Western and by the many vendors and service providers that she interacts with daily.

**Elaine’s last day will be Thursday, July 27th, 2023. Please save the date and join us at an open house to celebrate Elaine.**

**Open house:**
Thursday July 27th, between 3pm-4:30 pm
Support Services Building, Room 4210

---

**Sign up for the next Procurement Roundtable**
When: August 16th, 1pm
Course Number: OPER27
Click here for more information
Travel Management Company: Direct Travel

Direct Travel was the successful proponent for Western’s Travel Management request for proposal (RFP) tender.

Direct Travel is a global travel management company that focuses on providing personalized services for business travel. This agreement will provide the following benefits:

- **Competitive pricing and discounted rates**
- **Plane and train tickets* can be charged directly to your speed code**
- Online booking through Concur (email procurement@uwo.ca to set up)
- Designated team who will be familiar with your needs and Western’s Travel and Expense Policy and Procedures.
  - Email: team77@dt.com
  - Phone: 1-800-665-8795
  - 8:30am–6:00pm EST Monday to Friday
- After-Hours Support & Emergency Service:
  - North America: 1-888-700-6063
  - Global: 1-514-855-4263
  - Email: d24can@dt.com
  - Please quote access code 2BH9
- Dedicated Groups Team
- Direct2U Mobile App

**Next Steps:** Procurement Services will be notifying current FCM account holders in regard to transitioning their account to Direct Travel. This transition will occur before September.

**To set up a Direct Travel account, email** procurement@uwo.ca.

*At this time, train tickets cannot be purchased through the Concur online booking tool and will incur a full service booking fee when booking through a travel management company. The most economic option is to purchase directly from the Western VIA Rail Website.

**For more information on booking travel, please visit our Preparing to Travel website.**
Buying FSC and Recycled Paper

Changing the type of office paper we purchase is a simple yet significant action that can impact our planet and society. Next time you stock up, we encourage you to pick paper that's Forest Stewardship Council (FSC) certified, with a minimum of 30% post-consumer recycled content.

**Why does it matter?**

At Western University, approximately 104 tons of office paper are purchased every year. The production of this paper requires 11 million liters of water and results in over 930 tons of CO2 emissions, which is equivalent to running 187 cars. By switching to FSC certified paper with a minimum of 30% recycled content, we can collectively reduce our environmental impact and cut down on these emissions. Switching even half of the copy paper we purchase would result in 62 tons less wood use, 136,000 liters less water use and 80 tons less CO2 every year. *

**What is FSC-Certified Paper?**

FSC sets strict standards for responsible forestry practices that ensure no net loss of forest over time, protect water quality, and safeguard the rights of indigenous people and local communities. Many FSC certified paper options are made with recycled content.

Choosing FSC Certified doesn’t mean choosing low quality! Our preferred vendors on Mustang Market offer paper options that are rigorously tested and proven to perform just as well as regular paper when used in campus printers and photocopiers.

**Where to look**

To support our sustainability efforts, we recommend these five SKUs (found on the vendor punch-out catalogues in Mustang Market):

**FSC Certified with 100% recycled content:**
- STP620016 - Staples 100% Recycled FSC-Certified Copy Paper *(Staples)*
- RLA5101 - Rolland Enviro Copy Paper – FSC Recycled *(Staples)*
- 054922 - Boise Aspen 100 Multi-Use Premium Recycled Paper *(Grand & Toy)*

**FSC Certified with 30% recycled content:**
- 054901/054901-JR - Boise Aspen 30 Multi-Use Recycled Copy Paper *(Grand & Toy)*
- DPP1842 - Domtar FSC Certified EarthChoice30 Recycled Office Paper *(Staples)*
- STP572356 - Staples FSC-Certified 30% Recycled Copy Paper *(Staples)*

*(Environmental impact estimates were made using the Environmental Paper Network Paper Calculator Version 4.0. For more information visit [www.papercalculator.org](http://www.papercalculator.org))*

---

**Department Changes?**

**Personnel changes** where individuals have Mustang Market and/or Pcard access should be communicated to procurement@uwo.ca.

**New departments** or **Address changes** should also be communicated to procurement@uwo.ca. We will work with the department to create a suitable shipping address in Mustang Market, to ensure deliveries make it to the correct location.
Processing Invoices and Payments

Processing invoices and payments correctly is important to ensure Western is being compliant with the Canada Revenue Agency requirements and also to ensure we are being efficient and not duplicating efforts. The below flowchart provides some direction on how to select the most appropriate payment tool.

1. Who is the party being paid?
   - Organization
   - Corporation or Independent Contractor with HST Registration
   - Independent Contractor (Individual) without HST Registration or Western Student/Employee

2. What are we paying for?
   - Goods
   - Services
   - Other Payments

- Purchase Order or Purchasing Card
- Payment Requisition or Purchasing Card
- Payment Requisition
- Staff/Faculty/Grad Form
- Travel / Expense Reimbursement
- Staff/Faculty/Grad - Travel Advance -> Distribute funds to participants -> Expense report
- Guest/Undergrad Form (No HR profile)
- Research Participant Fees
- Under $500 annually per participant: Payment Requisition or Multi-Payment requisition, Expense Report with Cash Advance (if required)
- Over $500 annually per participant: Human Resources

Purchase Order in Mustang Market:
- Procurement of goods or services from corporations, organizations, or HST registered individuals.

Purchasing Card (Pcard):
- An easy and efficient payment method for low value transactions, such as conference registrations.

Payment Requisition form in PeopleSoft:
- Not procurement or HR related goods or services
- No HST implications
- Refer to the Help and FAQs for further instructions.
  Note: Multi-payment requisitions must be submitted through Mustang Market.

Human Resources (hrhelp@uwo.ca):
- Individuals without HST registration for:
  - Services (including accommodations and rentals), Participant Fees, or Recognition
- For more details on payments to faculty, staff, students, or individuals, contact HR or refer to the Operational Excellence One Time Payments workshop.

Expense Report Forms in PeopleSoft:
- Staff/Faculty/Grad expense form (active HR appointment)
- Guest/Undergrad form (no active HR profile)
  - Paper/pdf form no longer required
Creating a Requisition (Purchase Order) for the Entire Project

When creating a requisition for multi-year or multi-item procurements, or where a deposit is required, all years and items associated with the same procurement or project should be included on the same requisition. When orders are created for only a portion of the total cost, it can cause Western to be non-compliant with procurement directives.

To create separate lines on the requisition, for multiple years, deposits, or multiple items, use the Add to Cart and Return option on the Order Form’s action drop-down menu. Each addition will create a separate line on the requisition (and purchase order) document.

Please help Western remain compliant by creating orders for the entire amount of the purchase!

Procurement recognizes in some cases creating an order that contains the entire amount of a project or service can be challenging for the department budget. For those instances, please contact Procurement for solutions to keep Western compliant while not draining the department budget.

Managing Purchase Order Encumbrances

Reviewing your PO encumbrances (in your general ledges) and open POs (in Mustang Market) throughout the year can ensure that your unit’s budget is accurately reflecting encumbrances and actual payments. Open POs should be reviewed to ensure there are no missing vendor invoices and to ensure POs are closed when no remaining invoices are expected, or an order was cancelled.

For instructions to create your department’s Open PO report in Mustang Market, click here.
**Commodity Codes** should be selected based on the category or type of product or service. Codes are available for various types of supplies, equipment, and services.

Below are a few codes which are often misused, and examples of when they could be used:

- **R101** - Business Professional Services: May be used for non-strategic consulting
- **P101** - Events/Hospitality: May be used for catering for events
- **P103** - Entertainers/Presenters: May be used for guest speakers
- **T501** - Travel: May be used for travel accommodations where payment is by PO/invoice.

**Account Codes** for purchases should begin with a “6”; the full code will be in the format 6xxxxx. Below is a list of most commonly used account codes in Mustang Market.

- **622000** - Supplies
- **605500** - Equipment
- **605400** - Computer equipment
- **621900** - Services

---

**Reminder: Invoices submitted for payment must be a formal invoice!**

- Invoices with a PO number in Mustang Market -> Email invoice (with PO number) to apinvoice@uwo.ca
- Invoices without a PO: Use the Invoice Attached form in Mustang Market to submit your formal and final invoice

**Paying for a deposit?** Use an Order Form to create two requisition lines (one for the deposit and one for the remaining balance). Once the PO is created, you can send the deposit (along with the PO number) to apinvoice@uwo.ca.

---

**Vendor Bank Account Information**

Vendors who are being paid, or wish to be paid, via electronic methods (e.g. EFT or Wire transfer) may be communicating with the department instead of Procurement Services. **Bank account information should not be shared via email.** This is considered a high risk method of sharing sensitive information.

Please direct vendors inquiring about (or sharing) electronic payment information to vendor@uwo.ca. Vendor Services will work with the vendor directly to set up their preferred payment method.
Purchasing Card (P-Card)

Online Purchasing Card (P-card) Training Module

The interactive, self-paced modules will teach you what you need to know about obtaining, activating, and using Western’s Scotiabank Purchasing card, or “P-card,” to pay for goods and services. You will also learn Western’s guidelines and policies that you should adhere to when using your P-card.

*This training is highly recommended for anyone who may use a P-card.*

Please note that module 3 (How to reconcile your P-Card) is currently under development.

[Click here to access training module]

---

Step-Up Authentication Enablement for Online Purchases

**Effective July 10th, 2023**, a new process of step-up authentication was enabled for all ScotiaBank Visa Commercial Cards. Step-up authentication provides cardholders the ability to verify their online purchases using a one-time verification code that is sent to an email or phone number. This means that when making online purchases, cardholders may be prompted with step-up authentication.

**How it works**

- When completing an online purchase, cardholders may be required to have a verification code sent to their email or phone number to confirm the purchase (not all online purchases will have this additional authentication, it is only for merchants who are subscribed to this functionality).
- Cardholders choose the preferred delivery method – email or text message – for the code.

**Next Steps**

- Currently all P-card accounts have the cardholder’s Western email address on file. When making an online purchase cardholders can select email as the delivery method for the verification code.

- **Important:** If cardholders would like to add an alternate phone number, such as a cell phone number, to their account so they can receive the verification code via text message please contact [pcard@uwo.ca](mailto:pcard@uwo.ca) with the request (please note that this request should come from the cardholder directly).
**Merchant Surcharges**

Effective October 2022, Canadian merchants (with the exception of Quebec) have the option of adding a surcharge to a transaction when a consumer pays by credit or debit card. Merchants need to disclose the actual dollar amount of the surcharge on every receipt and disclose the fact that the merchant assesses a surcharge at the point of store entry and at the point of sale.

Please monitor for these charges when purchasing from a vendor. For more information, visit:


---

**Coming Soon…**

The P-Card Application and Change Request forms will be available in PeopleSoft Forms soon. These will be located in the Procurement/DOSA tile, along with the Mustang Market Access and Authorities forms:

---

**Gift Cards for Employees**

As per the CRA (Canada Revenue Agency), Gift Cards are not considered a taxable benefit as long as the amount provided to an employee is less than $500 for the tax year and a detailed list of recipients is maintained.

**Departments need to keep a log containing:**

- Name of employee
- Date the gift card was provided to the employee
- Reason for providing the gift card (part of social event, gift or award)
- Type of gift card
- Amount of the gift card
- Name of the retailer(s)

**Other conditions include:**

The card cannot be converted into cash and can only be used to purchase goods or services from a single retailer or a group of retailers identified on the card.

More information can be found here:

Customs & Logistics

Ordering Samples or Using a P-Card for Foreign Purchases

When using your P-card to purchase goods or when receiving samples or donations from foreign suppliers, your delivery address MUST show the University’s name as the first line.

Be sure to send a copy of the invoice or sample details to customs@uwo.ca along with your speed code.

This will help ensure your order clears Canada Customs in a timely manner.

Ethyl Alcohol Purchases & Record Keeping

Using ethyl alcohol for scientific purposes includes a requirement to keep record of the purchase, use, and disposal. This record keeping period is 6 years following the date of purchase.

All Campus purchases of 95% & 100% ethyl alcohol are done through Science Stores. Please visit the Science Stores website for additional information.

Record Keeping questions can be directed to customs@uwo.ca

Purchasing Vehicles

Before a vehicle is purchased, please notify the Facilities Management Vehicle Repair Shop (Dan Gyetvai, dgyetvai@uwo.ca) of the purchase. They can provide you with Western’s preferred vehicle vendors. This area looks after all license plate registrations, renewals, maintenance/repairs, and keeps a record of all vehicles currently owned by Western. Human Resources must also be notified to add the vehicle to Western’s insurance.

Visa Payables Automation (VPA) Program

Procurement Services is currently working with ScotiaBank and Visa on a new campaign to encourage more vendors to take advantage of our Visa Payables Automation (VPA) program.

The Visa Payables Automation program allows Western to send payments electronically to our vendors through their Point of Sale (POS) terminals. This is a secure, sustainable, and efficient payment method.

The next campaign will begin in August. Vendors may reach out to you directly for confirmation that the communication from Visa is legitimate. Visa will be reaching out to vendors during this time, at our request.

Questions can be directed to westernvpa@uwo.ca.
As our prime vendor for lab supplies and equipment and our preferred vendor for lab chemicals, Fisher Scientific offers the following benefits:

- Deeply discounted pricing, especially on high volume items on campus
- Fast, often next day delivery of items stocked in the designated warehouse*
- No transportation, hazardous materials, or dry ice charges
- 90-day hassle free return policy
- NLSU (New Lab Start-up) program with special incentives
- Over 2.5 million SKU’s available on Mustang Market

*For orders placed before 2pm.

Note: Consolidating your orders is more economical, efficient, and environmentally sustainable. Please try to submit larger, less frequent orders where feasible.

New Account Representative

The new Fisher Scientific Account Representative for Western University is Nadreen Elshawish. Please contact Nadreen for quotes, product, and order information and inquiries.

Please see below for information on our new Fisher representative, including contact information.

Nadreen Elshawish
Account Manager
Fisher Scientific
Mobile: 226 577 2583
nadreen.elshawish@thermofisher.com

Nadreen Elshawish

- I am a proud Mustang! I graduated from Western University with a Bachelor of Chemistry and I am excited to be back on campus
- After graduation, I pursued a post-graduate certificate in Cosmetic Science and gained experience in product development and formulating cosmetic products in the lab
- Previously worked as a Regulatory Scientist with Estée Lauder supporting cosmetic product registration for various international markets
- London has always been home, so I’m happy to support your needs and assist you in the city I know best!