

**University of Oregon
Purchase Order
Instructions**

1. Form Completion for Paper Purchase Orders (see “Additional Information” for Banner)

- 1.1. **Ship to.** Insert complete and valid UO department name and department address. No abbreviations or acronyms. Addresses must be official University locations. Shipment may not be made to any non-UO address.
- 1.2. **Bill to.** Insert complete and valid UO department and department address. No abbreviations or acronyms.
- 1.3. **Commodity Code.** Insert appropriate commodity code for the expenditure.
- 1.4. **Index.** Insert appropriate index/fund for the expenditure.
- 1.5. **Account Code.** Insert appropriate account code for the expenditure.
- 1.6. **Fiscal Year.** Insert appropriate fiscal year.
- 1.7. **Purchase Order Date.** Insert date PO is created or issued.
- 1.8. **Contractor Name and Business Address.** Insert the Contractor’s complete, legal name and business address. This is either the name of the individual if Contractor is a sole proprietorship or the name published on the website of the secretary of state in the state in which the company is incorporated or organized. **Do not use abbreviations.** If Contractor would like to provide a “doing business as” (dba) name, please include the dba name following the full legal name (e.g. “Oregon Coachways, Inc. dba OC&W Coachways”). Please note that the full legal name is still required even if a dba name is present.
- 1.9. **Shipping Instructions.** Automatically defaults to F.O.B. University, unless otherwise stated. If University is paying for shipping, use F.O.B. University, Freight Prepaid and Added.
- 1.10. **Delivery Date.** Delivery date is required. This must be an actual date; do not leave blank or write ASAP.
- 1.11. **Item No.** Start numbering at 1 and follow, 2, 3, 4....as needed.
- 1.12. **Description.** List the descriptions for all times ordered. If you wish to reference a separate document or quote, please refer to section titled “Additional Information”.
- 1.13. **Quantity.** List the quantity for each item ordered.
- 1.14. **Unit.** List the unit of measure for all items ordered (example – each, dozen, feet). .
- 1.15. **Unit Price.** List the price for each unit of measure.
- 1.16. **Multiple Delivery and/or Partial Payments.** If you wish to allow for delivery in more than one shipment or if you wish allow partial, interim payments prior to completion all work and delivery of all goods, please provide detailed text on the face of the PO outlining your requirements.

- 1.17. **Total Price.** List the sum of the unit price times the quantity.
- 1.18. **Total PO Amount.** List a total dollar amount of the entire PO at the bottom in the Total Price column.
- 1.19. **Check Boxes.** Mark the appropriate check box.

First check box: **Check** if Contractor agrees to the Purchase Order Standard Terms and Conditions.

Additionally, if the products or services being provided under the agreement cause the UO to incur risk that should be allocated to the Contractor, **check** the appropriate insurance requirements. The department must assist in assessing the risk potential of each contract. The risk associated with the contract is not solely dependent on the dollar amount of the PO.

Before the purchase order is executed by the University, Contractor must provide the requested Certificate of Insurance or Endorsement to University. Department shall furnish to PCS the requested documents along with the submission of the purchase order. Per the Purchase Order Standard Terms and Conditions, the certificates will be directed to the attention of the individual preparing the PO and sent to the department's "bill to" address. If department is not using the Purchase Order Standard Terms and Conditions (such as reference to another contract) make sure to include required insurance and submittal requirements on the face of the PO. If department has any questions regarding required insurance or regarding the certificates contact PCS. If an endorsement is needed, PCS will contact the department.

Second check box: Contractor agrees to the terms and conditions of the contract referenced above.

- 1.20. **Prepared By.** List name of department individual completing PO.
- 1.21. **Phone Ext.** List phone number of department individual completing PO.
- 1.22. **Funds Authorized By.** List name of department individual who has authorized the fund expenditure. This individual must be listed on the department's UO Department Approval Authorization Form as authorized to approve fund expenditures for the funds/index(es) being used for the purchase.
- 1.23. **Phone Ext.** List phone number of department individual who is authorized to approve fund expenditure.
- 1.24. **Other Approvals.** This section is reserved for other approvals necessary for PO processing (example – ORSA, etc.)
- 1.25. **Phone Ext.** List phone number of individual pertaining to the "Other Approvals" section.

2. **Additional Information for Paper and Banner Purchase Orders**

- 2.1. **Attachments.** All attachments added must be uniquely labeled and referenced on the PO.

2.2. Steps for Referencing Contractor Quotes.

2.2.1. When Contractor quote # must be referenced on the PO for the Contractor's internal processing enter the following statement:

“Contractor quote # _____ is noted for Contractor's internal reference purposes only and is not incorporated as part of this Contract.”

2.2.2. When you want to use the Contractor's listing of products or services rather than entering each line item on the PO, you must remove all other Contractor information on the quote including any terms and conditions and uniquely label the attachment as an exhibit (such as “Exhibit A.”. You must then reference that Exhibit on the face of the PO as follows:

“[Enter general statement of product or services to be purchased] as specified on Exhibit “[]” attached and by this reference incorporated as part of this Contract.”

2.3. **Contract Reference - State of Oregon.** If the PO is purchasing off of a State of Oregon Price Agreement, insert the following language in the body of the PO:

“THIS PURCHASE IS PLACED AGAINST STATE OF OREGON SOLICITATION # [insert #] AND PRICE AGREEMENT #: [insert #]. THE CONTRACT TERMS AND CONDITIONS AND SPECIAL TERMS AND CONDITIONS (T's & C's) CONTAINED IN THE PRICE AGREEMENT ARE HEREBY INCORPORATED BY REFERENCE AND SHALL APPLY TO THIS PURCHASE AND SHALL TAKE PRECEDENCE OVER ALL OTHER CONFLICTING T's & C's EXPRESS OR IMPLIED, EXCEPT WITH REGARD TO ANY PROVISIONS RELATING TO EXCLUSIVITY. UO IS NOT BOUND BY SUCH EXCLUSIVITY PROVISIONS.”

For Banner PO's, the required text has been broken up into 50 character lines in order to facilitate a smooth copy/paste functionality, as seen below:

“THIS PURCHASE IS PLACED AGAINST STATE OF OREGON
SOLICITATION # [insert#] AND PRICE AGREEMENT
#: [insert #]. THE CONTRACT TERMS AND CONDITIONS
AND SPECIAL TERMS AND CONDITIONS (T's & C's)
CONTAINED IN THE PRICE AGREEMENT ARE
HEREBY INCORPORATED BY REFERENCE AND SHALL APPLY
TO THIS PURCHASE AND SHALL TAKE PRECEDENCE OVER
ALL OTHER CONFLICTING T's & C's EXPRESS
OR IMPLIED, EXCEPT WITH REGARD TO ANY PROVISIONS
RELATING TO EXCLUSIVITY. UO IS NOT BOUND BY SUCH
EXCLUSIVITY PROVISIONS.”

In order to confirm the solicitation # and price agreement #, go to the OregonBuys eProcurement System site <https://oregonbuys.gov/bsol> and locate the correct agreement. Make sure that the goods and services being ordered are available from the price agreement referenced on the front of the PO. Verify that the Contractor has provided the preferred pricing required under the price agreement. Instructions for how to search OregonBuys can be found at <https://pcs.uoregon.edu/content/available-price-agreements>

- 2.4. **Contract Reference – University or other contract reference.** List the following language in the body of the PO:

“This Purchase Order is subject to the contract terms and conditions in the Agreement between the University of Oregon [if applicable - - (formerly known as the State Board of Higher Education acting by and through the University of Oregon)] and (Contractor), effective date (mm/dd/yy).”

- 2.5. **Contract Reference – Using PCS Approved Cooperative Agreements.** List the following language in the body of the PO:

“This purchase is pursuant to <Cooperative Agency> Contract <Number> between <Cooperative Agency> and <Awarded Contractor>, resulting from <Cooperative Agency> RFP <Number>. University of Oregon Purchase Order Standard Terms and Conditions apply to this purchase. In the event of conflict between <Cooperative Agency> Contract <Number> and University of Oregon Purchase Order Standard Terms and Conditions, University of Oregon Standard Terms and Conditions shall control.”