



NEW YORK STATE PURCHASING REQUIREMENTS for BUSINESS SERVICES CENTER CUSTOMER AGENCIES

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PREFERRED SOURCES

Corcraft, National Industries for the Blind,
NYS Industries for the Disabled, Buy OMH

Preferred Sources must be considered first. State agencies are required to purchase from a Preferred Source if it meets the agency's form, function and utility. If a Preferred Source is available and not used, the agency must document how it did not meet their form, function, or utility. Formal waivers are required.
See the Preferred Sources Guidelines: <http://www.ogs.ny.gov/BU/PC/Preferred.asp>

	Purchasing COMMODITIES & TECHNOLOGY from a Preferred Source		Purchasing SERVICES from a Preferred Source	
	If Your Dollar Amount of Purchase is \$0 - \$49,999	If Your Dollar Amount of Purchase is \$50,000 & over	If Your Dollar Amount of Purchase is \$0 - \$49,999	If Your Dollar Amount of Purchase is \$50,000 & over
What purchasing method do I use?	Procurement Card where possible or Purchase Requisition	Purchase Requisition	Procurement Card where possible or Purchase Requisition	Agency-specific contract. Agency does solicitation and enters requisition in SFS. BSC issues PO linked to the contract.
Who solicits quotes or issues bid documents? ¹	Agency - Use published price lists	Agency - Use published price lists	Agency - Written Quotes	Agency - Refer to Preferred Source Guidelines for Instructions
If Technology-related, is PTP approval required? ²	NO	YES	NO	YES
Do I have to advertise in the Contract Reporter?	NO	NO	NO	NO
Do I need OSC approval?	NO	NO	NO	YES - If over \$50,000 ⁴
Do I need a Vendor Responsibility Profile/ Checklist?	NO	NO	NO	NO
Do I need a Vendor Responsibility Questionnaire?	NO	NO	NO	NO
Is a NYS Procurement Lobbying Law form required?	NO	NO	NO	NO
Are there any MWBE Goals?	NO	NO	NO	NO
Do I need Buy Desk approval? ³	NO	NO	NO	NO
Do I need DOB B-1184 approval?	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)	YES	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)	YES

¹The BSC will conduct solicitations for Invitations for Bids for one-time commodity or service purchases upon request.

²Information Technology Services' Plan-to-Procure (PTP) approval is required for any IT procurement of a product or service equal to or greater than \$50,000. Approval is also required when procuring from or requesting exemption from purchasing from any aggregate or enterprise agreement, regardless of dollar amount.

³Buy Desk approval is not required for purchases from Preferred Sources or already established contracts resulting from a strategically sourced solicitation conducted by NYSPRO.

⁴For OGS, the discretionary purchasing limit is \$85,000 (for transactions processed in SFS, GLBU OGS01). OGS is not required to conduct a formal solicitation for purchases between \$50,000 and \$85,000. Three written quotes should be obtained. OGS is still obligated to advertise in the Contract Reporter for Open Market Purchases \$50,000 and over.



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2 NYS CENTRALIZED CONTRACT

State agencies must use New York State centralized contracts after consideration of Preferred Sources. Centralized contracts are administered by New York State Procurement (NYSPRO) and can be found on the OGS public website: <http://www.ogs.ny.gov/BU/PC/>. Customer support is available at 518.474.6717.

	Purchasing COMMODITIES, TECHNOLOGY & SERVICES from a Centralized Contract	Purchasing SERVICES via Centralized Contracts that require a minibid
	FOR ALL DOLLAR AMOUNTS	FOR ALL DOLLAR AMOUNTS
What purchasing method do I use?	Agency procurement card where possible or Purchase Requisition	Agency procurement card where possible or Purchase Requisition
Who solicits quotes or issues bid documents? ¹	Agency - from contract price lists or as defined in the contract	Agency defines requirements, conducts minibid, and enters requisition in SFS. BSC generates Purchase Order.
If Technology-related, is PTP approval required? ²	YES - If \$50,000 or more	YES - If \$50,000 or more
Do I have to advertise in the Contract Reporter?	NO	NO
Do I need OSC approval?	NO	YES - If over \$50,000 ⁴
Do I need a Vendor Responsibility Profile/ Checklist?	NO	NO
Do I need a Vendor Responsibility Questionnaire?	NO	NO
Is a NYS Procurement Lobbying Law form required?	NO	YES - If over \$15,000
Are there any MWBE Goals?	MWBE policies vary by agency. Check your agency's MWBE policy.	Agency sets as defined in centralized contract requirements.
Do I need Buy Desk approval? ³	YES - If over \$20,000	YES - If over \$20,000
Do I need DOB B-1184 approval?	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)

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OPEN MARKET

Agencies may purchase commodities, technology and services in the open market when the procurement/purchasing need cannot be met by a Preferred Source or NYS Centralized Contract.

	Purchasing COMMODITIES, TECHNOLOGY & SERVICES in the Open Market			Purchasing COMMODITIES & TECHNOLOGY in the Open Market	Purchasing ONGOING SERVICES in the Open Market	Purchasing with a MWBE, Small Business or Recycled/ Remanufactured Goods in the Open Market
	If Your Dollar Amount of Purchase is \$0 - \$2,500	If Your Dollar Amount of Purchase is \$2,501 - \$10,000	If Your Dollar Amount of Purchase is \$10,001 - \$49,999	If Your Dollar Amount of Purchase is \$50,000 & over	If Your Dollar Amount of Purchase is \$50,000 & over	If Your Dollar Amount of Purchase is \$50,001 - \$200,000 For purchases up to \$50,000, open market guidelines apply.
What purchasing method do I use?	Procurement Card where possible or Purchase Requisition	Procurement Card where possible or Purchase Requisition	Procurement Card where possible or Purchase Requisition	Purchase Requisition	Service Contract (ongoing requirement)	Purchase Requisition
Who solicits quotes or issues bid documents? ¹	Agency - Verbal quotes	Agency - 1 written quote	Agency - 3 written quotes	Agency or BSC Formal Bid	Agency Formal Bid	Agency - 3 written quotes
If Technology-related, is PTP approval required? ²	NO	NO	NO	YES	YES	YES
Do I have to advertise in the Contract Reporter?	NO	NO	NO	YES	YES	YES
Do I need OSC approval?	NO	NO	NO	YES - if over \$50,000 ⁴	YES - if over \$50,000 ⁴	YES - if over \$50,000 ⁴
Do I need a Vendor Responsibility Profile/ Checklist?	NO	NO	NO	YES	YES	YES
Do I need a Vendor Responsibility Questionnaire?	NO	NO	NO	YES - if over \$100,000	YES - if over \$100,000	YES - if over \$100,000
Is a NYS Procurement Lobbying Law form required?	NO	NO	YES - if over \$15,000	YES	YES	YES
Are there any MWBE Goals?	MWBE policies vary by agency. Check your agency's MWBE policy.	MWBE policies vary by agency. Check your agency's MWBE policy.	YES - if over \$25,000	YES	YES	YES
Do I need Buy Desk approval? ³	NO	NO	YES - if over \$20,000	YES	YES	YES
Do I need DOB B-1184 approval?	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)	DOB B-1184 approval threshold varies based on what is being purchased. See B-1184 Approval Thresholds (page 4)	YES	YES	YES

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DIVISION OF THE BUDGET B-1184 APPROVAL THRESHOLDS

Thresholds are subject to change based on DOB Bulletins. Thresholds stated here are as of September 2013.

If Your Dollar Amount of Purchase is \$500 or greater for the following purchases	If Your Dollar Amount of Purchase is \$20,000 or greater for the following purchases	If Your Dollar Amount of Purchase is \$50,000 or greater for the following purchases
<ul style="list-style-type: none"> • Conferences • Employee-Related Events • Membership Dues to Associations • Non-institutional Food Purchases • Cell Phones and Service Plans • Desk Top and Lap Top Computers • Fax machines • In-state Travel • PDAs/Smart phones and Service Plans • Out-of-State Travel - All Other • Out-of-State Travel - Staff with Commissioner • Printers • Promotional Items • Any request identified as a member item 	<ul style="list-style-type: none"> • Capital - New • Capital - Change Order/ Other • Capital - Multi-phase Projects • Contracts - Amendments • Contracts - New • Contracts - RFP/RFI/Pre-Contract • Equipment • Leases - Amendment • Leases - Escalation/ Holdovers/Other • Leases - New • Lease, Maintenance and Repairs • Local Assistance Grants • Purchase Orders - As Applicable • Contractual Services • Copiers • Supplies and Materials • Temporary Personal Services • Vehicles 	<ul style="list-style-type: none"> • Centralized Contracts

ABOUT THIS PURCHASING REQUIREMENTS GUIDE

The information in this guide is intended to provide general purchasing criteria only. Please note that some requirements may vary. Specific requirements should be discussed with the BSC on a case-by-case basis. All employees involved in the vendor selection process should be familiar with the agency's Minority/Woman Owned Enterprise (M/WBE) usage goals. M/WBE vendors are to be solicited for quotes, whenever possible. Equipment maintenance requirements should be placed on the Equipment Maintenance Insurance Policy (REMI Program) whenever practical. Agencies should never sign a vendor's form contract without consulting with their Legal Department.

WEBSITES

Preferred Source Guidelines:
<http://www.ogs.ny.gov/BU/PC/Preferred.asp>

OGS Public Website - NYSPRO
<http://www.ogs.ny.gov/BU/PC/>