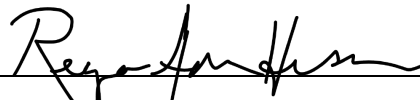




Department Procedure No. FIN-104a-13

Title:	Information Technology Purchasing Procedure
Authorizing Source:	Policy No. FIN-104-02 State Administrative and Accounting Manual (SAAM), Sections 30.30 , 30.40 , 30.45
Forms:	State Property Documentation Form: FORM-FIN-WMDF_1005-11
Information Contact:	Contracts & Procurement Administrator, (253) 512-7137; Procurement & Supply Specialist, (253) 512-7164; IT Operations Manager, (253) 512-7112
Effective Date:	October 22, 2013
Mandatory Review Date:	November 13, 2028
Revised:	November 13, 2024
Approved By:	 Regan Hesse, Chief Financial Officer Washington Military Department Director

Purpose

To establish a clear, efficient, and transparent procedure for the Washington Military Department (WMD) to follow for the procurement of assets and equipment related to Information Technology (IT).

Scope

This procedure applies to WMD employees, members of the Washington State Guard, members of the National Guard on state active duty, and federal employees who either supervise state employees or manage state business activities. Individuals involved with purchasing IT equipment for the Washington Youth Challenge Academy (WYCA) are exempt from the

provisions of this procedure for WYCA procurement, as they operate under their own standard operating procedure.

Definition

IT Purchase – A purchase of items/equipment classified within the commodity Capital Asset Class Code major group 70XX. These include items/equipment of the following designations:

- 7010 – Mainframe Computer Systems
- 7011 – Servers
- 7012 – Desktop Computers (PCs)
- 7013 – Laptops and Notebook Computers
- 7014 – Tablets and Smart Phones
- 7015 – Front End Communications Processors
- 7016 – Data Processing Terminals
- 7017 – Data Communications Equipment (Multiplexers, Modems, Routers, Hubs, and Switches)
- 7025 – Input/Output Storage Devices - Tape
- 7026 – Input/Output Storage Devices - Disk (Laser and Magnetic)
- 7027 – Input/Output Storage Devices – Other
- 7033 – Multifunction Devices (Copiers, Fax Machines, Scanners, and Printers)
- 7034 – Plotters
- 7035 – Other IT Accessorial Equipment and Components (Scanners, Data Displays, Speakers, Microphones, etc.)
- 7037 – Monitors
- 7038 – Laser Printers
- 7039 – Impact and Other Printers
- 7042 – Mini/Microcomputer Systems (Used primary to control larger systems, such as HVAC)
- 7042 – Testing and Monitoring Equipment

Items that are often associated with IT equipment but are not deemed to be IT purchases include keyboards, computer mice, external webcams, wired and Bluetooth headsets, desk risers, and computing setup enhancements (privacy screens, webcam covers, laptop stands, and cooling devices).

NOTE: For questions about item designations, reach out to the information contacts listed in this policy. Please note that this procedure applies solely to the equipment specified above. Software acquisitions follow a different procedure.

Responsibilities

Actor	Action
Requestor/Requestor's Supervisor/EMD Asset Custodian	<ol style="list-style-type: none">1. Submits request for purchase via Service Desk Ticket System.2. Reviews the quote generated by the IT Operations Manager3. Approves or rejects the quote. It is the responsibility of the actor(s) to ensure proper purchasing authority is followed. Purchasing authority varies by division.4. Provides the coding instructions for purchase if the quote is approved.5. EMD Asset Custodian ONLY: Physically receives equipment delivery for EMD Equipment Requests, verifies received equipment using packing slip, and informs Procurement & Supply Specialist of receipt within one business day.6. Signs State Property Documentation Form (SPDF), if required, and Purchase Order (PO) upon receipt of asset(s).
IT Operations Manager	<ol style="list-style-type: none">1. Reviews submitted equipment requests in the Service Desk Ticket System.2. Creates quotes for purchase and replies to requests via the ticket system with quote attached.3. Assigns the ticket to the Procurement & Supply Specialist if quote is approved by Requestor/Requestor's Supervisor/EMD Asset Custodian.
IT Representative	<ol style="list-style-type: none">1. Physically receives equipment delivery for Standard Equipment Requests that require imaging, verifies received equipment using packing slip, and informs Procurement & Supply Specialist of receipt within one business day so item may be tagged before distribution to requestor.2. Images the equipment as required before distribution.3. Distributes imaged equipment to the Requestor/Requestor's Supervisor/EMD Asset Custodian after item has been tagged by the Procurement & Supply Specialist.4. Informs all relevant parties of the distribution status of imaged equipment via the Service Desk Ticket System.

Mail Processing Manager	<ol style="list-style-type: none"> 1. Physically receives equipment delivery for Standard Equipment Requests that do not require imaging; informs Procurement & Supply Specialist of receipt within one business day.
Procurement & Supply Specialist	<ol style="list-style-type: none"> 1. Reviews request for quote/purchase. 2. Confirms shipping location with Requestor/Requestor's Supervisor/EMD Asset Custodian. 3. Uses the approved quote and ticket information to generate PO. 4. Places order for equipment after receiving the approved PO. 5. Assigns asset tag numbers and prepares the SPDF for distribution and signature. 6. Affixes asset tags to equipment upon receipt by agency. Note: If items are shipped to locations other than Camp Murray, Procurement & Supply Specialist ships tags to appropriate asset custodian that are to be affixed to equipment prior to use. 7. Distributes imaged equipment to the Requestor/Requestor's Supervisor/ EMD Asset Custodian. 8. Informs all relevant parties of the distribution status of imaged equipment via the Service Desk Ticket System. 9. Ensures that the SPDF and PO are signed appropriately upon distribution of equipment. 10. Submits PO and Invoice to Accounts Payable's Submission for Payment portal. 11. Files all completed documentation in appropriate files on SharePoint.
Contracts & Procurement Administrator	<ol style="list-style-type: none"> 1. Reviews and approves the PO generated by the Procurement & Supply Specialist.
Chief Financial Officer or Designee	<ol style="list-style-type: none"> 1. Provides final approval for the PO generated by the Procurement & Supply Specialist.
Accounts Payable Representative	<ol style="list-style-type: none"> 1. Receives and processes payment request upon submission to Accounts Payable.

Procedure: Standard Equipment Request and Purchase

- 1. Submitting Equipment Request:** The Requestor submits an equipment request ticket through the Service Desk Ticket System by sending email to servicedesk@mil.wa.gov.
- 2. Review and Quotation:**
 - The IT Operations Manager reviews the equipment request ticket.
 - The IT Operations Manager generates a quote from an approved vendor for the requested equipment, in accordance with the WMD Procurement, Contracting and Leasing Policy ([FIN-111-02](#)). The quote is uploaded into the ticketing system for review by the Requestor and the Requestor's supervisor, if necessary.
- 3. Approval of Quote**
 - The Requestor and Requestor's supervisor, if necessary, review the quote.
 - Quote is either approved or rejected.
 - In the event of a rejection, the rejecting party will notify the IT Operations Manager of the rejection via the Service Desk Ticket System. If the rejecting party does not notify the IT Operations Manager of the rejection, the ticket will be closed when the quote expires (30 days from quote generation).
 - Upon approval, the Requestor or the Requestor's supervisor will provide the coding information for purchase via the Service Desk Ticket System.
- 4. Generating Purchase Order (PO):** The Procurement & Supply Specialist uses the approval information from the Service Desk Ticket System to generate a PO. See Appendix A for PO information requirements.
- 5. Approval of Purchase Order (PO):**
 - The PO is reviewed and approved by the Contracts & Procurement Administrator. The PO will then forward to the Chief Financial Officer (CFO) or designee.
 - The CFO (or designee) provides final approval for the PO.
- 6. Placing the Order:** With the approved PO, the Procurement & Supply Specialist places the order for the equipment.
- 7. Receiving the Equipment:**
 - If the item requires imaging:
 - The item is shipped to IT for physical receiving.
 - The IT representative who physically receives the equipment verifies that the received equipment matches the packing slip and informs the Procurement & Supply Specialist within one business day of receipt.
 - If the item does not require imaging:
 - The item is shipped to the Camp Murray Mailroom for physical receiving.

- The Mail Processing Manager informs the Procurement & Supply Specialist within one business day of receipt. The Procurement & Supply Specialist will verify that the received equipment matches the packing slip.

8. Generating Property Documentation and Asset Tagging:

- Upon notification of physical receipt of the equipment, the Procurement & Supply Specialist assigns a state asset tag number and prepares the State Property Documentation Form (SPDF).
- The Procurement & Supply Specialist prepares the PO for signature by the Requestor or Requestor's supervisor.
- The Procurement & Supply Specialist affixes the asset tags to the equipment by traveling to either IT or the Camp Murray Mailroom.
- The Procurement & Supply Specialist informs the Requestor, the Requestor's supervisor, the IT Operations Manager, and all other pertinent parties of the equipment's tagging via the Service Desk Ticket System. As part of the notification, the Procurement & Supply Specialist distributes the SPDF and PO via the Service Desk Ticket System for signature.

9. Imaging: The IT Division images the equipment as needed.

10. Distribution:

- If an item requires imaging:
 - When equipment is ready for distribution, an IT Representative informs all pertinent parties of the status via the Service Desk Ticket System.
 - The Requestor arranges for pickup/delivery of the equipment via the Service Desk Ticket System.
- If an item does not require imaging:
 - When equipment is ready for distribution, the Procurement & Supply Specialist informs all pertinent parties of the status via the Service Desk Ticket System. (Note: This may be done in conjunction with actions detailed in step 8.)
 - The Requestor arranges for pickup/delivery of the equipment via the Service Desk Ticket System.

11. Completion of Documentation:

- After the equipment has been received by the Requestor, the Requestor signs the SPDF and PO certifying receipt of the equipment.
 - The following information must be provided as part of the PO signature:
 - Date of Receipt
 - Name of Requestor
 - Signature of Requestor
 - Phone Number of Requestor

- The Requestor returns the forms to the Procurement & Supply Specialist via the Service Desk Ticket System. The Procurement and Supply Specialist saves the documents for further processing and closes the ticket in the Service Desk Ticket System.

Procedure: EMD Equipment Request and Purchase

- 1. Submitting Equipment Request:** The EMD Asset Custodian submits an equipment request ticket through the Service Desk Ticket System by sending email to servicedesk@mil.wa.gov.
- 2. Review and Quotation:**
 - The IT Operations Manager reviews the equipment request ticket.
 - The IT Operations Manager generates a quote from an approved vendor for the requested equipment, in accordance with the WMD Procurement, Contracting and Leasing Policy ([FIN-111-02](#)). The quote is uploaded into the ticketing system for review by the EMD Asset Custodian.
- 3. Approval of Quote**
 - The EMD Asset Custodian reviews the quote.
 - Quote is either approved or rejected.
 - In the event of a rejection, the rejecting party will notify the IT Operations Manager of the rejection via the Service Desk Ticket System. If the rejecting party does not notify the IT Operations Manager of the rejection, the ticket will be closed when the quote expires (30 days from quote generation).
 - Upon approval, the EMD Asset Custodian will provide the coding information for purchase via the Service Desk Ticket System.
- 4. Generating Purchase Order (PO):** The Procurement & Supply Specialist uses the approval information from the Service Desk Ticket System to generate a PO. See Appendix A for PO information requirements.
- 5. Approval of Purchase Order (PO):**
 - The PO is reviewed and approved by the Contracts & Procurement Administrator. The PO will then forward to the Chief Financial Officer (CFO) or designee.
 - The CFO (or designee) provides final approval for the PO.
- 6. Placing the Order:** With the approved PO, the Procurement & Supply Specialist places the order for the equipment.
- 7. Receiving the Equipment:**
 - The item is shipped to EMD for physical receiving.
 - The EMD Asset Custodian verifies that the received equipment matches the packing slip and informs the Procurement & Supply Specialist within 24 hours of receipt.

8. Generating Property Documentation and Asset Tagging:

- Upon notification of physical receipt of the equipment, the Procurement & Supply Specialist assigns a state asset tag number and prepares the State Property Documentation Form (SPDF).
- The Procurement & Supply Specialist prepares the PO for signature by the EMD Asset Custodian.
- The Procurement & Supply Specialist goes to EMD to affix the asset tags to the equipment. The Procurement & Supply Specialist informs the EMD Asset Custodian, the IT Operations Manager, and all other pertinent parties of the equipment's tagging via the Service Desk Ticket System. As part of the notification, the Procurement & Supply Specialist distributes the SPDF and PO via the Service Desk Ticket System for signature.

9. Imaging and Return Distribution:

- The EMD Asset Custodian arranges for delivery of the items to IT for imaging, if necessary.
- The IT Division images the equipment as needed.
- When equipment is ready for redistribution, an IT Representative informs all pertinent parties of the status via the Service Desk Ticket System.
- The EMD Asset Custodian arranges for pickup/delivery of the equipment via the Service Desk Ticket System.
- The EMD Asset Custodian arranges for pickup/delivery of the equipment to the end user.

10. Completion of Documentation:

- After the equipment has been received by the End User, the EMD Asset Custodian signs the SPDF and PO certifying receipt of the equipment.
 - The following information must be provided as part of the PO signature:
 - Date of Receipt
 - Name of EMD Asset Custodian
 - Signature of EMD Asset Custodian
 - Phone Number of EMD Asset Custodian
- The EMD Asset Custodian distributes the SPDF to the End User for signature. Upon signature, the End User returns the SPDF to the EMD Asset Custodian
- The EMD Asset Custodian returns the forms to the Procurement & Supply Specialist via the Service Desk Ticket System.
- The Procurement and Supply Specialist saves the documents for further processing and closes the ticket in the Service Desk Ticket System.

Procedure: Payment and Documentation Process (Follows both Standard and EMD Equipment Request and Purchase Process)

1. Submission of Payment Documentation:

- The Procurement & Supply Specialist collects the signed Purchase Order (PO) and the equipment invoice(s) and verifies that the information contained within the documents matches.
- The documents are submitted to Accounts Payable for payment. For detailed instructions regarding the use of the Accounts Payable Submission for Payment portal, click [here](#).

2. Assignment and Notification:

- An Accounts Payable Representative is assigned to process the payment request.
- An email is sent to the Procurement & Supply Specialist indicating the assignment.

3. Handling Rejected Requests (if necessary)

- If the payment request is rejected, the Procurement & Supply Specialist will promptly contact the assigned Accounts Payable Representative.
- The Procurement & Supply Specialist will address the issues and provide any additional information or corrections needed for approval.

4. Finalizing Payment and Documentation:

- Upon approval and distribution of the payment by Accounts Payable, the Procurement and Supply Specialist will:
 - File all related documents, including the signed PO, invoice, and approval confirmation, in the appropriate location on SharePoint.
 - Ensure that the records are properly organized and accessible for future reference.

Appendix A: Purchase Order (PO) Information Requirements

When filling out a PO, it is essential to provide accurate and complete information to ensure timely procurement and smooth payment processing. The following information is required for all POs used in Information Technology Purchasing:

- **Vendor:** Select vendor as stated via invoice.
- **Ship To:**
 - For Standard Equipment Requests, ship to IT or Camp Murray Mailroom.
 - For EMD Equipment Requests, ship to EMD.
- **Tag #:** Type *TBD*
- **Authority/Contract #:** Type *Statewide Contract #(XXXXXX)*, information can be found on the Washington State Department of Enterprise Services website [here](#).
- **Type of Purchase:** Select *Purchase Order* from dropdown
- **Delivery Date:** Leave Blank
- **Terms:** Select *Upon Receipt* from dropdown
- **FOB Point:** Select *Destination* from dropdown
- **QTY:** Type as stated via invoice
- **Description:** Type as stated via invoice
- **Unit Price:** Type as stated via invoice
- **Tax Rate:** Type the applicable sales tax rate. This can be found on the Department of Revenue [website](#).
- **Special Instructions:** Type *IT Ticket #(Ticket No), Approved by (IT Operations Manager) and (other approver(s))*
- **Vendor No:** Type Statewide Vendor number as found on OFM's website [here](#).
- **Master Index:** As stated in request
- **S-O:** As appropriate, information can be found on OFM's website [here](#).
- **SSO:** As appropriate, information can be found on OFM's website [here](#).
- **Attachment:** Attach copy of quote.