



EQUIPMENT & AWARD END DATES

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WELCOME to BFS Mini Tune-ups

OBJECTIVE:

Online meetings to provide campus staff with a high level perspective and information on both topics of interest and new/upcoming initiatives and policy updates.

PRINCIPLES:

- Sessions are conducted via Zoom and will last no longer than 30 minutes
- Participants will be muted during the session
- Chat questions can be submitted but priority will be given to questions submitted ahead of time at www.bfs.ucsb.edu/coaching
- The Mini Tune-up website will be updated with session details and information



Equipment Purchasing & Award End Dates

Equipment purchases near the end of an award period generate intense scrutiny and red flags to external auditors

- All equipment should be ordered at least 90 days prior to the end date of an award and promptly received in order to justify usefulness to the completion of the project



Equipment Purchasing & Award End Dates

Department/Principle Investigators are responsible to provide justification and/or sponsor approval for equipment purchases within the last 90 days of the award end date

- Any expenditures made for budgetary convenience (“use up remaining funds”) is not allowable
- An [Equipment Purchasing – Award End Date Less Than 90 Days Form](#) is now required for equipment purchased within the last 90 days of the award end date



Equipment Purchasing & Award End Dates

Gateway Accounting Codes

Accounting Codes								
These values apply to all lines unless specified by line item								
Department	Account String	Sub Account	Cost Type	Fund Type	Award Type	Award End Date Within 90 Days	Department Invoice Review	Award End Date
MSI MARINE SCIENCE INSTITUTE	MSI-000000-8- 784755-22572	4 Equip	no value	5 United States Government	3 GRANT	Y	MSI Department Approval	01/31/2018



Equipment Purchasing & Award End Dates

Gateway Home Page

Home

Shop

Documents

Contracts

Accounts Payable

Suppliers

Reporting

Administer

Setup

UCSB PROCUREMENT GATEWAY

Shop > Shopping > Shopping Home > Home/Shop

Welcome to UCSB Procurement Gateway!

Notices:
The Gateway Forms Class on Wednesday, 11/8 has space. Register below.

Register for training at: [https://learningcenter.ucsb.edu-search \"Gateway.\"](https://learningcenter.ucsb.edu-search \)

[Email Gateway Helpdesk](#)

[New Supplier Request Form](#)

Attachments:

EQUIPMENT PURCHASES MADE FEWER THAN 90 DAYS FROM AWARD END DATE- NEW

Form A: Federal Source Selection & Price Reasonableness (10/17)

Form A: Non-Federal Sole Source (1/16)

Form A-1: Sole Source Disclosure (10/16)

Form M: Professional Services Price Reasonableness (11/15)

Form G: Non-Hosted Business Meeting Expenditures

Form I: Request for Services (1/17)

[More Procurement Forms](#)

Equipment Purchasing & Award End Dates

Equipment Purchasing Guidelines

- General purpose equipment
- Special purpose equipment

[Equipment Purchasing – Award End Date Less Than 90 Days Form](#) (page 2)



Equipment Purchasing & Award End Dates

Q&A



CLOSING - BFS Mini Tune-ups

NEXT STEPS:

Visit the Mini Tune-ups website to:

- View our session blog updates
- Sign up for future sessions and submit questions
- Submit suggestions for future topics

<https://www.bfs.ucsb.edu/coaching>





Thank You!

WRAP UP