

OREGON STATE HOSPITAL

POLICY ATTACHMENT

PROCEDURES A: Purchase, Receiving, and Equipment Maintenance **POLICY: 4.018**

POINT PERSON: Chief Financial Officer

APPROVED: Superintendent **DATE: 6/18/2025**

SELECT ONE:

<input type="radio"/> New policy attachment proposal	<input type="radio"/> Minor/technical revision of existing policy attachment
<input type="radio"/> Reaffirmation of existing policy attachment	<input checked="" type="radio"/> Major revision of existing policy attachment

I. OREGON STATE HOSPITAL (OSH) PURCHASE PROCESS

- A. Purchases of general supplies, assets, electrical equipment, small equipment, furniture, appliances, non-medical equipment, and fixtures must follow these procedures.
- B. OSH Facilities, Food Services, and Warehouse departments procure stocked and non-stocked items through Oregon's electronic procurement system.
- C. Before making a purchase, staff must determine where the item is to be used.
- D. If an item is for a patient care area, purchasing staff must use the Purchase Safety Checklist to complete an initial assessment of the item (unless item being purchased is addressed in a Critical or Urgent DME) which includes, but is not limited to:
 1. Viewing OSH food guidelines
 2. Reviewing room risk levels per OSH policy 8.009, "OSH Safety Program."
 3. Viewing the log of completed Product Risk Assessments (PRA) maintained by the OSH Safety department.
 4. Completing a PRA request per Procedures B for items that do not have a PRA. Items that may be similar to an item with a completed PRA require a PRA of their own.
 5. Conferring with Salem or Junction City Facilities departments about medical equipment or installing product in OSH buildings.
 6. Checking the Safety Data Sheet (SDS) database maintained by OSH Safety department for purchases of chemicals. If an SDS is not already in the database, staff must send the SDS to OSH Safety department.

- E. After initial item assessment, staff must verify whether OSH Warehouse stocks the item as the first step in the OSH buy decision process.
1. If the item is available through OSH Warehouse, staff must complete a material request via OSH's internal electronic product ordering system.
 2. If the item is not available or not stocked by OSH Warehouse, purchasing staff must continue the buy decision process as described in OAR 125-247-0200 to determine the source of the purchase.
 3. If a purchase source other than the OSH Warehouse is identified through the buy decision process, staff must complete the appropriate OSH purchase process defined below.

II. OSH PURCHASE PROCESS (CONTINUED)

A. General Supplies

1. Complete all applicable steps in section I of these procedures.
2. Staff must complete the OSH Purchase Requisition Form (MSC 0114OSH). The form is considered complete, and staff may proceed with the purchase when the form is signed by a manager that:
 - a. Is an authorized signer with financial expenditure decision authority granted per OSH policy 1.016, "OSH Delegation of Authority," and
 - b. Has completed SPOTS training per Procedures C (only if the purchase method is a SPOTS card).
3. Once the OSH Purchase Requisition Form (MSC 0114OSH) is complete, if the purchase method is a SPOTS card:
 - a. Make an in-person purchase and maintain SPOTS documentation per Procedures C, or
 - b. Place the order electronically, email the completed OSH Purchase Requisition form to OSH Warehouse, and maintain SPOTS documentation per Procedures C.
4. Once the OSH Purchase Requisition Form (MSC 0114OSH) is complete, if the purchase method is a purchase order:
 - a. Email the OSH Purchase Requisition form to Office of Contracts and Procurement (OC&P).
 - b. OC&P completes the purchase order, makes the purchase, and notifies OSH staff of the purchase per OC&P's established protocols.

5. Once the OSH Purchase Requisition form (MSC 114OSH) is complete, if the purchase method is surplus property program or Oregon Corrections Enterprises:

- a. Contact the program to request the item or initiate the purchase process.

B. Furniture/Appliances

1. Complete all applicable steps in section I of these procedures.
2. Obtain and document appropriate prior approval per OSH policy 4.018 requirements.
3. Email OSH Warehouse describing the furniture/appliance request.
4. OSH Warehouse determines if the item is in stock.
 - a. If the item is in stock,
 - i. Staff must submit a work order to OSH Warehouse per OSH's internal electronic work order system to have the item delivered to their work area. Items cannot be delivered to staff remote work locations (see OSH policy 5.031, "Flexible Work Solutions"); and
 - ii. Staff must submit a work order to Facilities per OSH's internal electronic work order system if the item needs to be assembled.
 - b. If the item is not in stock, OSH Warehouse shall direct the purchasing staff to complete the purchase individually. In such cases, staff must follow the purchase process for general supplies to complete the purchase.
5. Warehouse staff must notify the purchasing staff when ordered furniture/appliances are delivered so purchasing staff may submit any appropriate work orders to have the item assembled and delivered to their work area.

C. Non-Medical Electrical Equipment/Fixtures

1. Complete all applicable steps in section I of these procedures.
2. Obtain and document appropriate prior approval per OSH policy 4.018 requirements.
3. Email OSH Facilities describing the non-medical equipment/fixture request.
4. OSH Facilities determines if the item is in stock.
 - a. If the item is in stock,
 - i. Staff must submit a work order to OSH Warehouse per OSH's internal electronic work order system to have the item delivered to their work

area. Items cannot be delivered to staff remote work locations, (see OSH policy 5.031, "Flexible Work Solutions"); and

- ii. Staff must submit a work order to Facilities per OSH's internal electronic work order system to have the item installed in their work area. OSH staff cannot assist with installing items at staff remote work locations (see OSH policy 5.031, "Flexible Work Solutions").
 - b. If the item is not in stock, OSH Facilities works with the purchasing staff to assess the request for appropriateness and complete the purchase per department protocols.
5. Warehouse staff must notify the purchasing staff when ordered equipment/fixtures are delivered so purchasing staff may submit any appropriate work orders to have the item delivered to their work area and installed.

D. Small Equipment

1. For desk phones, submit a request to the Unify Support website. For assistance, contact the Office of Information Services (OIS) Service Desk.
2. For leased equipment (excluding leased copiers/fax/print machines), contact the OSH Contract Analyst in the Business Analyst office for consultation.
3. For leased copiers/fax/print machines, contact OC&P for consultation.

III. RECEIVING ORDERED ITEMS

- A. OSH Warehouse manages standard processes for receiving and handling ordered items.
- B. Items ordered through purchase orders, print orders, supply chain orders, or SPOTS cards **must** be delivered to OSH Warehouse for verification, receiving, and delivery. Ordered items cannot be delivered directly to staff remote work locations (see OSH policy 5.031, "Flexible Work Solutions").
 1. Deliveries that are not addressed to a patient may be opened by Warehouse staff per department protocols to verify all order contents have been received in good condition. Patient deliveries are handled per OSH policy 7.001, "Mail and Packages for Patients," and OSH policy 7.017, "Native Artifacts and Property."
 2. If there are discrepancies in count, condition, or kinds of items ordered on purchase orders, print orders, or supply store chain orders, OSH Warehouse must notify the vendor.
 3. If there are discrepancies in count, condition, or kinds of items ordered through a SPOTS purchase, the SPOTS cardholder must notify the vendor.

4. Staff receiving items delivered by OSH Warehouse must sign the OSH Warehouse logbook or other receiving document as directed by OSH Warehouse staff as verification of order receipt. Deliveries that are not signed for may be returned to sender.
 5. SPOTS Cardholders are responsible to maintain required SPOTS documentation per Procedures C.
- C. OSH Warehouse maintains records of delivered purchases using hard copy receivers. Hard copy receivers are required for every purchase delivered to the OSH Warehouse.

IV. INVOICE PAYMENT

- A. Invoices should be signed to authorize payment once an order is received and verified. No payment may be made without a hard copy invoice signed by:
 1. OSH Warehouse manager for Warehouse purchases; or
 2. A manager with appropriate delegated expenditure authority (see OSH policy 1.016, "OSH Delegation of Authority) for other purchases.
- B. Signed invoices must be emailed to OSH Business Office, Accounts Payable for payment processing.

V. MAINTENANCE

- A. Excluding desk phones, staff must contact OC&P for instructions on physical maintenance of leased small equipment, such as printers and copiers.
- B. Repairs or maintenance of any assets (excluding information technology assets), electrical equipment, and small equipment not on a lease or maintenance agreement (excluding desk phones) require:
 1. A work order submitted to OSH Warehouse per OSH's internal electronic work order system to have the item picked up and delivered to OSH Facilities department (if applicable); and
 2. A work order submitted to OSH Facilities department per OSH's internal electronic work order system for the repair or maintenance.
- C. Staff must contact OIS Service Desk for maintenance on desk phones.
- D. Staff should contact OSH Facilities department if they see something in need of repair and are unsure of how that item is classified (electrical equipment, IT equipment, medical equipment, etc.). OSH Facilities assists staff with finding the appropriate maintenance request process.