

**Purchasing Policies and Procedures**

## Purchase Requests

Effective Date: July 1, 2009

Board Approval: June 9, 2009

**1. Purpose.**

The purpose of this policy is to outline the policies and procedures for making purchases.

**2. Policy.****2.1 All Purchases must follow the Procure to Pay Process 01-01.**

**2.2 Division of Requirements.** Procurement requirements shall not be artificially divided to avoid using the source selection methods and signature approval requirements set forth in this policy.

**2.5 Non-Compliance with Purchasing Policy.** Non-compliant purchasers will be subject, at the discretion of the Vice President of Fiscal Operations, to withdrawal of the authority to make purchases or to a reduction in the dollar amount authorized for purchases.

**3. Procedures.****3.1 Requestor**

- a) Follow the guidelines of the General Policies 01-00 and Procure to Pay Process 01-01.
- b) Review request for availability of budgeted funds. If the purchase is for information technology goods or services, acquire required signatures.
- c) Complete Purchase Order Request form, including all fields. Check the Purchase Order Request box (for Check Request see Payment Policy). Attach quote sheet to Purchase Order Request form.
- d) If purchase is being made using a State contract, write the State contract number on the Purchase Order Request form.
- e) Obtain all appropriate approval signatures on the request form.
- f) If request is less than \$2499.99, forward all copies to Fiscal Services Office.
- g) If \$2,500 or more forward all copies to appropriate Vice President of Fiscal Operations for approval.

**3.2 Vice President of Fiscal Operations**

- a) Review all requests over \$2,500. If over \$5,000, forward to the President. Review request to determine compliance with policies and procedures, including price quotes, State contract number, appropriate accounting information, completeness, budget availability, proper authorizing signatures, and compliance with contracts, grants, and other legal requirements.
- b) If approved, forward all copies to the Fiscal Services Office.
- c) If rejected, return to Requestor with explanation.

**3.3 Purchasing Agent**

- b) Review request to determine compliance with policies and procedures, including price quotes, State contract number, appropriate accounting information, completeness, proper authorizing signatures, and compliance with contracts, grants, and other legal requirements.
- b) If the purchase is for information technology goods or services, determine that approval has been obtained from the Information Technology Department.
- c) If not acceptable, return to Requestor with an explanation.
- d) Place order with vendor for goods or services. If required, send a copy of Purchase Order Request form to vendor. The Requestor may place the order with the vendor only after approval and coordination with the campus Purchasing Agent.
- e) Maintain the order form for tracking Shipping and Receiving purposes.
- f) Upon receipt of the Invoice, attaché all related paperwork and provide it to the Accounting Clerk for payment.

#### 3.4 Accounting Clerk

- a) Track payments of invoices against purchase orders and note when all related invoices have been received and paid. (See Payment Policy for detail procedures.)