

MAKING A PURCHASE (Quick Guide)

STEP 1 - Is the vendor you are wishing to purchase from in CSI?

YES – Move on to the next question

NO – Contact the vendor and request: a W9, NJ Business Registration Certificate (BRC if purchase is over \$6,000), and signed Unauthorized Memo Receipt.

Send the vendor the following memos found on the district website (under Financial Information): **Unauthorized Order Memo** and **Ethics in Purchasing Memo**.

Once you receive the W9, NJ BRC and Unauthorized Memo Receipt, send all of this information to Lisa Rasaw (Purchasing) along with the **Vendor Request Form** for processing. Vendors are usually processed within a day or two of submittal. If additional information is needed, Lisa will contact the person submitting the **Vendor Request Form**.

STEP 2 - Is the purchase for goods or services less than \$6,000?

YES – Move on to the next question

NO – The quotation threshold is \$6,000 – any items costing more than this amount must have (2) additional quotes from (2) other vendors. All quotes must be submitted with the requisition, **Quote Form** (filled out/signed by the vendor) and **Purchase Request Form**.

STEP 3 - Are you responsible for completing the requisition?

YES – Make sure all required documentation is included in the submittal. Required documentation consists of, but is not limited to quotes, pricing information etc.) Complete the requisition and submit the signed **Purchase Request Form**, requisition and backup to Lisa Rasaw (Purchasing) for administrative approval.

NO – Give all your documentation (quotes, pricing information, Purchase Request Form, etc) stating the educational or operational rationale for the purchase to the person that will be responsible for completing the requisition.

Once this process is completed, it's in the hands of the Business Office for approval and to submit to the vendor for fulfillment of the order.

If you have any specific questions regarding purchasing, please refer to the Purchasing Manual located on the district website under Board of Education (Financial Information)