



Purchasing Procedures & Entering Requisitions

Pennsauken School District
Purchasing Department

2024/2025 School Year



Introduction

- In order to process requisitions for the purchase of supplies, services, textbooks, etc., the following purchasing procedures must be followed.
- All requests must be submitted through the SMARTS Budgetary Accounting System through a requisition process.



Purchasing Limits

- One Line Item over \$800 – *two* written quotes
- Entire Requisition over \$2,000 – *two* written quotes
- Goods and Services exceeding \$6,600 require competitive quotes – contact Purchasing
- Contracts exceeding \$17,500 require a C271 Political Contribution Disclosure form prior to purchase



Purchasing Limits continued

- Contracts exceeding \$44,000 must be approved by the BOE prior to purchase
- Contracts *not required* to be bid in excess of \$44,000 must be approved by BOE (Textbooks, State Contract, Prof. Services)
- Minimum Order - \$25.00 preferred
- Labor costs over \$2,000 must include Prevailing Wage Rates



Formal Quote/Bid Process

- The formal quote process takes approx. 2 – 4 weeks to complete.
- The formal bid process takes approx. 6 – 8 weeks to complete.

Formal Bid Process in Purchasing Manual –
Appendix A



Quotes

- Attach all quotes to the requisition
- Date must be current, no more than 30 days
- Must be a quote not an invoice
- Quotes should have company logo, letterhead or name/address, date of quote, quote #, contract #, catalog #/item code/ISBN #, full description, shipping/handling, total price, etc.
- BRC and W9 required – new vendors



Quotes/Bids

~You cannot circumvent the law by splitting purchases to be under the quote or bid threshold.~



Unauthorized Purchases

- All requests for purchases of goods and/or services must be made through an approved purchase order signed by the SBA, *prior* to the goods or services received.
- Any school district employee who orders and/or receives any materials, supplies or services without first going through the approved purchase order process has made an unauthorized purchase.

***~Unauthorized purchases are a violation of
State Law and Board Policy~***



Purchasing Prohibitions

- **Contracts:** Employees are prohibited from signing any contract offered by a vendor. Contracts should only be signed by the Business Administrator.
 - **Reimbursements:** Employees are prohibited from receiving reimbursements for supplies.
 - **Private Purchases:** Goods and services must be purchased through the purchase order process.
- ~ Employees will be responsible for the full cost of the contract and/or purchase.~*



Food Supplies

New Jersey State Law allows for the purchase of food supplies for the *school cafeteria* or *home economics classes*.

- **ShopRite:** Always use the designated account card for your depart./school. Original receipts must be submitted. Do not order from home.
- **Food Supplies:** only items that are considered “*eaten or drunk*” will be accepted.



Sole-Source

- According to Local Finance Notice 2010-3, *The Public School Contract Law does not include a sole-source exception and therefore, districts must use the competitive contracting process or the bid process pursuant to N.J.S.A. 18A:18A-15(d) for the procurement of proprietary services.*
- At least two (2) quotes are needed if over \$2,000.



Fixed Assets

- Fixed assets are property, plant or equipment, assets that are long-term and continued use, such as land, buildings, machinery, and equipment.
- A fixed asset is a single item cost of \$2,000 or more.
- Must be included in the budget in order to purchase.



Ethics

- All District employees are to practice exemplary ethical behavior in the purchasing process. Employees are to avoid any action that may be considered a conflict with their position with the District and those dealings with vendors who provide goods and services to the District.
- Ethics violations could lead to criminal action.
- **GIFTS FROM VENDORS ARE PROHIBITED!**
- Please refer to the Purchasing Manual for guidelines.

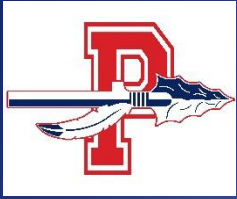


Purchasing Manual

**Purchasing Guidelines and Manual
are on the website listed under Staff.**



Requisitions



Requisitions

Requisitions must include the following:

- Quote # and Date
- Contract #
- Item # and Full Item Description
- Quantity
- Unit Size
- Price
- Discount Information
- Shipping/Handling
- Delivery Information
- Budget Account Code(s)
- Board Approval Information
- Quote/Bid Number and Description
- Memo – Click on memo icon for special instructions or a note. This will *not* show up on the PO.
- Attachments – Quote(s), Board Minutes, Contract, Receipts, Workshop Info., etc.
- L=A: Account Balance



Requisitions

Bid/Quote Information

- Quote: 'as per IFQ#***'
- Bid: 'as per IFB#***'
- Date of Opening
- Board Approval Info (for bids)



Requisitions

Cooperative Information

- State Contract pricing: 'as per NJ State Contract #****'
- Ed Data Pricing: 'as per Ed Data Bid#***, Vendor Bid #****'
- ESCNJ (formerly MRESC): 'ESCNJ Cooperative Pricing System #65 MCESCCPS, ***'



Requisitions

Cooperative Information continued

- W.B. Mason: 'Prices per NJ Cooperative #65MCESCCPS, ESCNJ Bid#22/23-20'
- School Specialty: 'Prices per Ed Data Bid#11789, NJ Coop #26EDCPS'

Please contact the Purchasing Department to order from NJ State Contract, ESCNJ, Other Coops or Quote/Bids.



Vendor Message:

When selecting the vendor, if you receive a pop-up message, please contact Purchasing before moving forward with the requisition.



IMPORTANT:

Your order will be delayed if there is missing or incorrect information on the requisition. A rejection of the requisition is possible.



Purchase Order Entry

1. Select PO Entry
2. Today's Date
3. Click on *Get Next Future PO#*
4. Select Vendor
5. Add Description
6. Add Department or User Name
7. Select Ship Location
8. Bid Drop Down Box – Choose Bid, No Bid, Quote or S. Cont
9. Discount% - Total Order
10. Click on Next to enter items
11. Begin first line with description of order and then Quote #, Invoice #, etc.
12. Enter Each item – Item #, Description
13. Enter Quantity
14. Enter Item Price
15. Select Unit Size
16. Enter Discount
17. Enter Shipping/Handling
18. Add Board Approval Info, Bid/Quote Info, Ed Data Info, NJ State Contract Info, etc.
19. Click on Accts
20. Enter Proper Acct Code
21. Click on L=A
22. Attach Backup Paperwork
23. Click Print on Save

PO Entry-New

Date: 11/30/2016 P.O.# [Get Next Future PO#](#)

Vendor: Discount%:

Description: Dept: Print Y

Ship Loc: Bid Auto Pay

Next Accts Save L=A Print on Save Memo \$0.00 L-A

Account (dbl Click for Status)	Description	\$0.00

Line	Spell (Start with '*' = No Discount, 'S.' = Ship)	Qty	Item Amount	Unit	Total Amount

Item Total: 0.00



SAMPLE REQ

Get next future PO#
Department
No Bid

Vendor #
Description
Ship Location

Account
Balance

Account
Code(s)

Item # and Full
Description

Ed Data
Information

PO Entry-New

Date: 12/02/2016 P.O.#: 703432 [Get Next Future PO#](#)

Vendor: 2461 SCHOOL SPECIALTY, INC. Discount%:

Descrip: General Classroom Supplies Dept: LAL Print: Y

Ship Loc: 25 Fine c/o Pennsauken BOE WH No Bid Auto Pay:

Next Lines Save ☒ L=A Print on Save ☐ \$0.00 L-A

Account (Dbl Click for Status)	Description	
11-190-100-610-303-25	Elementary LAL Supplies	\$103.08

Line	Spell (Start with '*' = No Discount, 'S.' = Ship)	Qty	Item Amount	Unit	Total Amount
0005	Item Code#3816B Markers - Washable Crayola, Fine Tip. Vendor Item Code 9008538030	4	1.960	SET	7.84
0010	Item Code 7033H Post-It Rolls, 3M 1 x 700" Tape. Vendor Item Code 9040734030	4	2.640	ROLL	10.56
0015	Item Code#9-081537-030 Bag ziploc Double Zipper Storage Gallon 250/CS. Vendor Item Code 9-081537-030	2	42.340	PKG	84.68
0020	As per Ed Data Bid#5849, Vendor Bid#7775324141	0	0.000		

Item Total: 103.08



SAMPLE REQ

Discount

*Shipping/Handling:

On separate line,
type "S." a window
opens to enter
shipping dollars or
percentage of order.

Proposal or
Quote #
Date, *S/H

PO Entry-New

Date: 12/05/2016 P.O.#: 703433 [Get Next Future PO#](#)

Vendor: 1713 HOUGHTON-MIFFLIN HARCOURT Discount%: 10

Descrip: Books Dept: Curriculum Print: Y

Ship Loc: 02 Director Curr. c/o Penn.BOE WH No Bid Auto Pay

Next Lines Save ☒ L=A Print on Save \$0.00 L-A

Account (Dbl Click for Status)	Description	
11-190-100-610-000-04	General Supplies ES	\$234.00

Line	Spell (Start with '*' = No Discount, 'S.' = Ship)	Qty	Item Amount	Unit	Total Amount
0005	GRADE K: ISBN 1502777 9780547863320 JOURNEYS COMMON CORE READER'S NOTEBOOK CONSUMABLE COLLECTION GRADE K	10	13.000	EA	130.00
0010	GRADE 1: ISBN 1502778 9780547860701 HOUGHTON MIFFLIN JOURNEYS COMMON CORE READER'S NOTEBOOK CONSUMABLE COLLECTION GRADE 1	10	13.000	EA	130.00
0015	As per Proposal 12/5/16, Journeys k-4, As per Greg Bernhardt	0	0.000		
0020	Shipping/Handling Included	0	0.000		

Discount Amount: 26.00 Discounted total: 234.00 Item Total: 260.00

Discount
Breakdown



SAMPLE REQ

Memo Checked

PO Entry-New

Date: 12/05/2016 P.O.#: 703434 [Get Next Future PO#](#)

Vendor: 2160 OFFICE BASICS, INC. Discount%:

Descrip: Office Supplies Dept: HS Print: Y

Ship Loc: 31 HS c/o Pennsauken BOE WH No Bid Auto Pay:

Next Accts Save ☒ L=A Print on Save ☐ Memo ☒ \$0.00 L-A

Account (Dbl Click for Status)	Description	
11-190-100-610-000-31	General Supplies High School	\$18,427.80

Line	Spell (Start with '*' = No Discount, 'S.' = Ship)	Qty	Item Amount	Unit	Total Amount
0005	Item #HON34962CL HON 34000 Series 34962 Pedestal Desk 60"x30"x29.5", 4 box drawers, file drawers, double pedestal. Color: Harvest, Laminate: Putty, Steel	20	921.390	EA	18,427.80
0010	As per #57-CCCPS Pricing System	0	0.000		
0015	Please deliver directly to: Pennsauken HS, 800 Hylton Road, Pennsauken, NJ 08110	0	0.000		
0020	Board Approved Dec 2016 Res#45	0	0.000		
0025	Delivery to 20 HS teachers				

Item Total: 18,427.80

Office Basics
Coop Info.

Special
delivery info.

Board
Approval

Memo – will not show
up on PO



Help Menu

Click on **Help** in the Budgetary System for more detailed steps on entering requisitions.

Budget Help File

Hide Back Print Options

Contents Index Search

Type in the keyword to find:

po

- PO Entry
- PO Invoice/Check Journal
- PO List Entry
- PO Memo Find
- PO Print
- PO Total Change Percent or Dollar Amt
- Print Check Labels for PO
- Printing
- Purchase Order Changes
- Purchase Order Email
- Purchase Order Journal
- Purchase Order Journal by Account
- Purchase Order Summary List
- Purchase Orders to be Printed
- Purge
- Receipt Entry
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- Receipt of PO Items
- Receipt Setup
- Receipts Report
- Reissue Lost Check
- Report Catalog
- Report Location Quantity
- Report of the Secretary to the Board of Edu
- Report Request for Quote
- Report Vendor Bids
- Report Xtab Bids
- Requisition Accounts
- Requisition Approval
- Requisition Names
- Requisition Status
- Requisition Status Report
- Roll Grant POs to Future FY
- Security by Class
- Security by User
- Segment Description Listing
- Select Account
- Select Category / Subcategory
- Select Check
- Select Fixed Asset

Display


PO Entry

Purpose

The PO Entry screen is used in the initial creation of a purchase order or requisition. The security placed on the user who is doing the entry determines whether the entry is a purchase order or requisition.

The PO Entry screen always shows the original order. If an order is adjusted at a later time, the adjusting entries can be displayed in the Payment Entry screen.

Window Attributes

Click on the  icon or choose PO Entry from the Expenditures menu. The Select PO screen is then invoked. Once a selection is made, regardless of whether it is a new PO, a new requisition, or an existing order, the PO Entry screen is displayed.

Because some users of the system prefer to use the keyboard for data entry, while others prefer a mouse or touch-pad, the PO Entry screen has been designed to accommodate either preference. Throughout the document, any keyboard shortcuts will be shown in blue.

The screen is divided into four (4) sections

- Header
- Lines and descriptions
- Account codes
- Additional buttons and controls

PO Entry-201779

Date 05/29/2002 P.O.# 201779

Vendor PRED PEARSON EDUCATION

Ord Desc THIRD GRADE TEXT BOOKS Dept TEA

Ship Loc 1 MAIN ST SCHOOL

Next Accts Save L=A Print on Save



The purchase order process may take 5 – 10 days to complete. Please plan accordingly.

Please refer to the Purchasing Manual on the school's website for more detailed information.



**Any questions, please contact
the Purchasing Department.**

(856) 662-8505
ext. 6510 or 6511