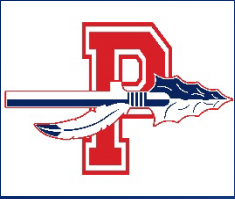




Purchasing Procedures & Entering Requisitions

Pennsauken School District
Purchasing Department

2025/2026 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.



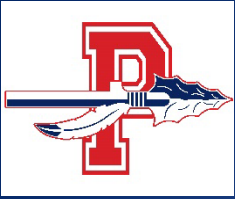
Purchasing Limits

- One Line Item over \$1,200 – *two* written quotes
- Entire Requisition over \$3,500 – *two* written quotes
- Goods and Services exceeding \$7,950 require competitive quotes – contact Purchasing
- Contracts exceeding \$17,500 require a C271 Political Contribution Disclosure form prior to purchase



Purchasing Limits continued

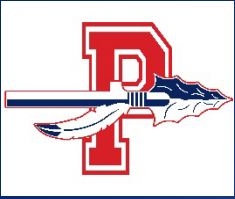
- Contracts exceeding \$53,000 must be approved by the BOE prior to purchase
- Contracts *not required* to be bid in excess of \$53,000 must be approved by BOE (Textbooks, State Contract, Prof. Services)
- Minimum Order - \$25.00 preferred
- Labor costs over \$2,000 must include Prevailing Wage Rates



Formal Quote/Bid Process

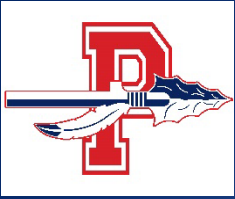
- The formal quote process takes approx. 2 – 4 weeks to complete.
- The formal bid process takes approx. 6 – 8 weeks to complete.

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

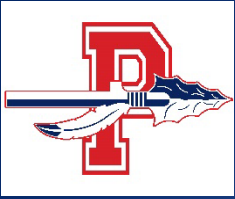
~You cannot circumvent the law by splitting purchases to be under the quote or bid threshold.~



Unauthorized Purchases

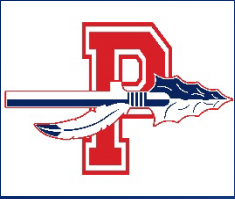
- All requests for purchases of goods and/or services must be made through an approved purchase order signed by the SBA, *prior* to the goods or services received.
- Any school district employee who orders and/or receives any materials, supplies or services without first going through the approved purchase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

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



Purchasing Prohibitions

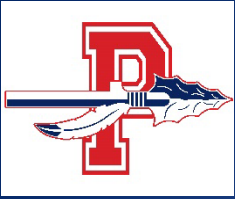
- **Contracts:** Employees are prohibited from signing any contract offered by a vendor. Contracts should only be signed by the Business Administrator.
 - **Reimbursements:** Employees are prohibited from receiving reimbursements for supplies.
 - **Private Purchases:** Goods and services must be purchased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



Food Supplies

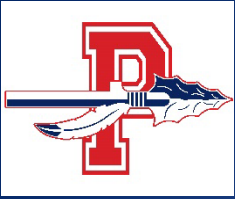
New Jersey State Law allows for the purchase of food supplies for the *school cafeteria* or *home economics classes*.

- **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.



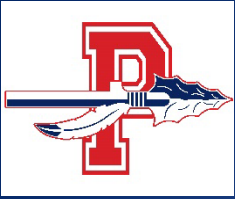
Sole-Source

- 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 \$3,500.



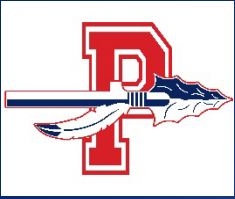
Fixed Assets

- 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.



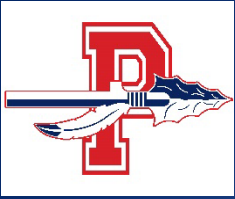
Ethics

- 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.**



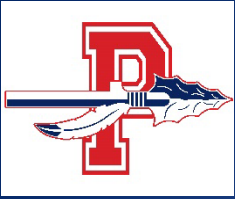
Requisitions



Requisitions

Requisitions must include the following:

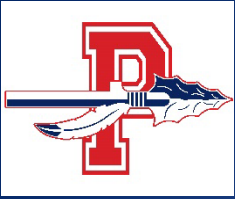
- Quote # and Date
- Contract #
- Item # and Full Item Description
- Quantity
- Unit Size
- Price
- Discount Information
- Shipping/Handling
- Delivery Information
- Budget Account Code(s)
- Board Approval Information
- Quote/Bid Number and Description
- Memo – Click on memo icon for special instructions 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

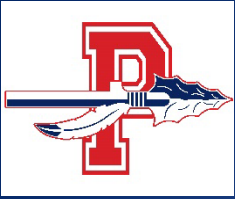
- Quote: 'as per IFQ#***'
- Bid: 'as per IFB#***'
- Date of Opening
- Board Approval Info (for bids)



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, ***'

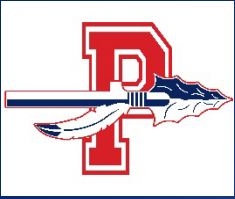


Requisitions

Cooperative Information continued...

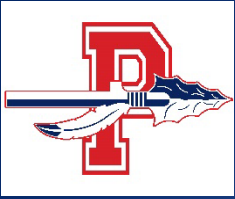
- W.B. Mason: 'Prices per NJ Cooperative #65MCESCCPS, ESCNJ Bid#22/23-20'
- School Specialty: 'Prices per Ed Data Bid#11789, NJ Coop #26EDCPS'

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



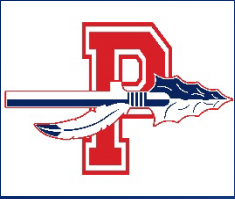
Vendor Message:

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%: _____

Descrip: _____ 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 ☒ \$.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				

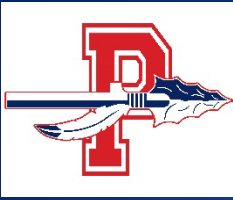
Item Total: 18,427.80

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.


The screenshot shows a window titled "Budget Help File" with a toolbar containing "Hide", "Back", "Print", and "Options". Below the toolbar are tabs for "Contents", "Index", and "Search". A search box labeled "Type in the keyword to find:" contains the text "po". A list of topics is displayed, with "PO Entry" selected and highlighted in blue. The main content area is titled "PO Entry" and contains the following text:

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**.

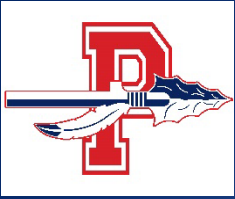
The screen is divided into four (4) sections

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

Below the text is a screenshot of the "PO Entry-201779" screen. It shows a form with the following fields:

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		

At the bottom of the form are buttons for "Next", "Accts", "Save", and "L=A". There is also a "Print on Save" checkbox.



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