

**Who:** The PI is ultimately responsible for the budget on each of his/her projects but support staff may be asked to complete some of this work.

**What:** TCNJ has five prescribed methods of procuring goods and services and various forms that are required to document, authorize and pay for a purchase.

**Where:** Policy: <http://policies.tcnj.edu/policies/digest.php?docId=9391>; Forms: [finance.tcnj.edu/forms/](http://finance.tcnj.edu/forms/); Training: <http://academicgrants.tcnj.edu/ug-training/>; Purchasing Department: <http://finance.tcnj.edu/purchasing/>, Administrative Services Building Room 201.

**When:** The procurement process should occur prior to making any purchases for grant activities. Once the invoice for the purchase has been received, a Check Request form should be completed and submitted to pay the vendor/consultant (refer to Check Request Quick Guide for more information).

**Why:** This process ensures compliance with federal, state, and institutional policies for purchasing.

**How:** Review the procurement methods and thresholds at <http://finance.tcnj.edu/purchasing/purchasing-guidelines/> and flow chart below to determine what method is necessary based on the size of the purchase. Complete the necessary form(s) and process. Deliver the completed and signed form(s) with the appropriate supporting documentation.

### **Purchasing Forms Flowchart:**

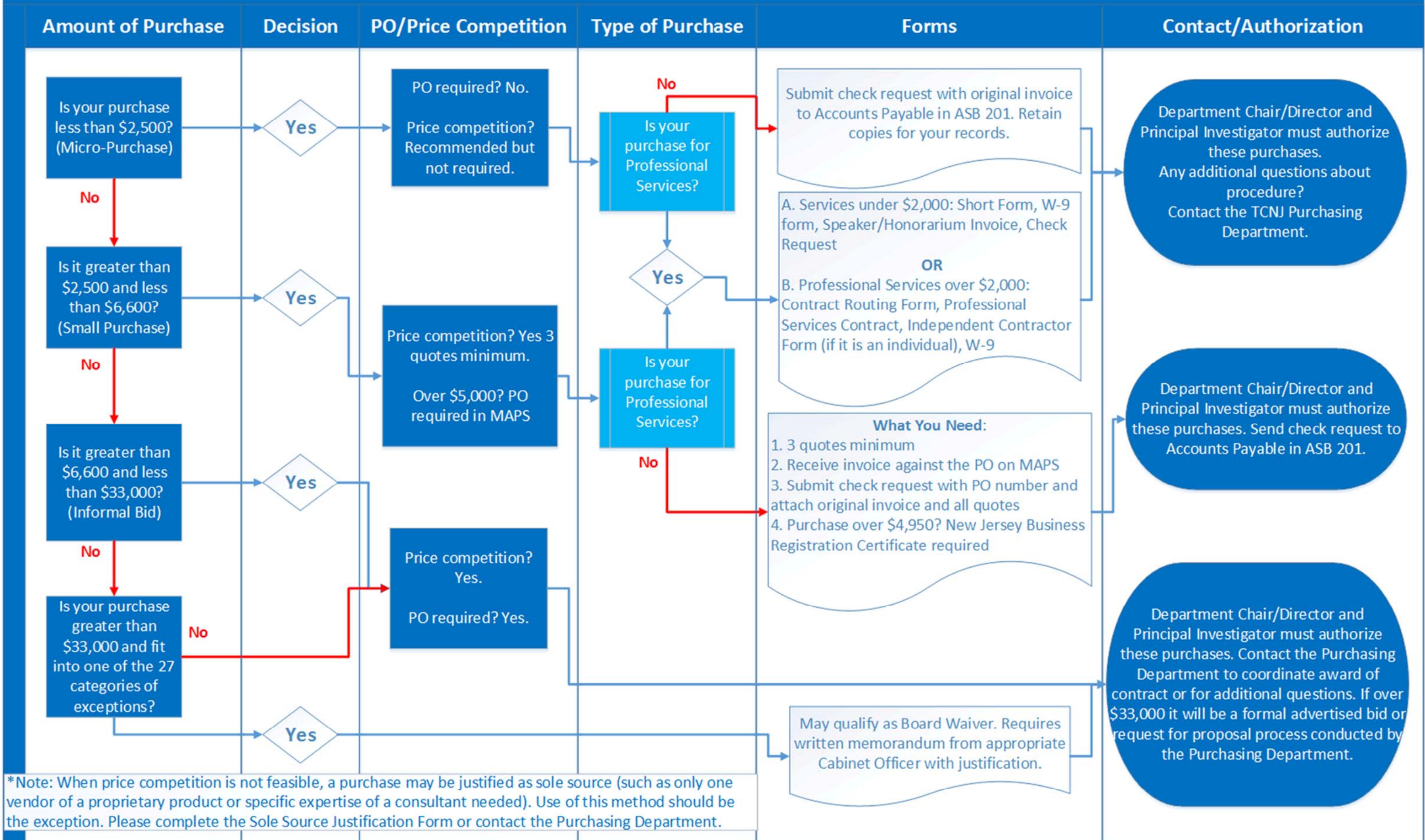
See page 2.

### **Tips:**

- Be proactive in initiating your purchase and contacting the purchasing department with questions. Some procurement methods require lead time.
- Enter purchase orders in MAPS prior to making the purchase, receive invoices against the purchase order prior to submitting the check request and indicate the purchase order number on the check request to ensure a timely payment to the vendor.
- Contracts for professional services and related documents must be completed prior to the services being rendered.
- Purchase orders are required for subaward agreements over \$5,000. The purchase order should be entered as soon as the subaward agreement is executed.
- Retain scanned copies of forms and other documentation (informal quotes, e-mails, grant documents, etc.) justifying the procurement method was followed in case they are requested by the purchasing department or grantor.
- Retain scanned copies of check requests and invoices for your records.

**More Information:** For more information refer to the Grant Financial Management Manual or contact the Office of the Treasurer at 609.771.2186 or the Purchasing Department at 609.771.2495.

# TCNJ Procurement Methods



\*Note: When price competition is not feasible, a purchase may be justified as sole source (such as only one vendor of a proprietary product or specific expertise of a consultant needed). Use of this method should be the exception. Please complete the Sole Source Justification Form or contact the Purchasing Department.