Requestor prepares SOW, Reporting and/or Drawing Requirements, Specs, Internal Estimate, Sole Source, etc.

Estimate < $2,500?

YES

Purchase With Purchase Card

NO

Release against Blanket Purchase Agreement (BPA)

Under Existing Blanket Contract?

YES

Vendor proceeds to perform the work, ships the order

NO

Verify Quantities, Review Invoices, Obtain Signature from Requestor & Send Approval to Accounts Payable

Accounts Payable sends a check to Vendor

Stop

Generate Purchase Requisition & forward SOW, Specs, etc. to Purchasing

Operator submits PR through PeopleSoft. It is forwarded to the relevant Department Supervisor/Manager

Approval of Official(s)?

YES

Purchasing Manager assigns Requisition to the Buyer

Send SSJ back to Requestor for revision

NO

Sole Source Justification Adequate?

YES

Release Against CSU MEA, CMAS, GSA or Consortium Purchasing Agreements

Contract Types:
- Purchase Order – Goods/Services/IT Contracts
- Blanket Purchase Agreement (BPA)

Determine proper contract type

Threshold?

< $50K

$50K

> $250K

Request for Quotation (RFQ) (verbal or hard copy)

Request for Proposal (RFP) (hard copy only)

A

< $50K

> $100K

VP Admin & Finance Approval > $100K

CO’s Office of CS&P Approval > $250K

IT Related – Obtain VPAT

On-site Work – Obtain Insurance Cert.

Legend – Action performed or determined by:
- Requestor (with Buyer, if specified)
- Buyer
- Official(s) as specified

A&F, Finance
August 2014
Purchase Requisition to Purchase Order Process

Legend – Action performed or determined by:
- Requestor (with Buyer, if specified)
- Buyer
- Official(s) as specified

A

Competition

Award based on low bid?

Award based on Best Value (i.e.: price, technical, quality, etc.)?

Post RFQ/RFP to BidSync & obtain Quotes

Quotes higher than Req $ Amount?

Select Vendor

Forward RFQ/RFP to Vendor & Obtain Quote

Receive Proposal from Vendor & forward to Requestor for review

Source Selection Board (SSB) is established to select Vendor, SSB establishes Evaluation Criteria (with Buyer)

Threshold > $50K

Requisition amount must be revised to include adequate funding

Quotes higher than Req $ Amount?

Select Vendor (with Requestor). SSB Approval Required

Obtain Insurance Cert. from Vendor

Work On-Site?

Negotiate Price, T & C’s, Delivery Date, etc.

Obtain Director Review

Any Exceptions to Terms & Conditions?

B
Purchase Requisition to Purchase Order Process

Legend – Action performed or determined by:

- Requestor (with Buyer, if specified)
- Buyer
- Official(s) as specified

Threshold?

- Buyer Approves if within delegation (< $50K) 
- or- Sent to Purchasing Manager for Approval ($100K)

- R. Todaro Director of Procurement
  - > $250K
  - D. Haydon Assoc. VP
  - B. Wells VP A&F

- Award Purchase Order or Contract

Vendor proceeds to perform the work, ships the order

Verify Quantities, Review Invoices, Obtain Signature from Requestor & Send Approval to Accounts Payable

Accounts Payable sends a check to Vendor

Stop

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