

Procurement Process

- 1. Identify Need
- 2. Identify Procurement Method
- 3. Obtain a Quote from the Supplier
- 4. Submit Requisition through JavelinaBuy
- 5. Purchase Order Issued to Supplier
- 6. Supplier Fulfills Order
- 7. Dept. Receives Good/Services
- 8. Supplier Invoices TAMUK
- 9. Accounts Payable Pays Supplier

Procurement Quick Reference Guide

Procurement Methods

- 1. Procurement Card (P-Card)
- 2. Non-PO Based Invoices (JavelinaBuy)
- 3. Requisitions (JavelinaBuy)
- Punch-Out Catalog Requisitions
 - Non-Catalog Item Requisition

Types of Purchases

1. Delegated Purchases: Purchases that departments have the authority to process.

2. Non-Delegated Purchases: Purchases that departments must go through Procurement Services to process.

P-Card	<u>Type of Purchase: Delegated</u> Card Limits vary by departmental need / Expedited way to make purchases / Purchase up to \$5,000.00
Non-PO Based Invoice	<u>Type of Purchase: Delegated</u> Reimbursements / Memberships / Non-Controlled Items; all less than \$5,000.00
Punch-Out Catalog	<u>Type of Purchase: Delegated</u> Any Dollar Amount / No P-Card Transactions / Already Approved Contracted Items / Fast and Efficient / Invoices are automatically sent to Accounts Payable
Non-Catalog Item	<u>Type of Purchase: Non-Delegated & Delegated</u> Any Dollar Amount / Controlled Items / Items Not Available through a Punch-Out Catalog (Order Categories Below) / Items Not Allowed on P-Card / Stipends

✓ <u>1-Regular Order Category: Non-Catalog Item:</u>

Service/Maintenance Contracts / Multi-Year Contracts / Contract Renewals / All Services – Regardless of Cost / Total purchase request that exceed \$5,000.00

2-Confirming Category: Non-Catalog Item (Check the Box: Route to Procurement Services) Utilized for Non-Compliant/Non-Delegated Purchases / Purchase Order is not sent to the supplier / An Exception Letter is typically issued Required Support Documentation: Non-Catalog Item
Requisition:

Quote / Proposal / Contract (Either Supplier's or a TAMUK Contract)

No Invoices are allowed – You should not have an invoice as the goods/services have not been procured yet, this is especially true for Contract Renewals.

Required Support Documentation:

Invoice and any other related documentation The responsible department is required to email the invoice to <u>invoices@tamuk.edu</u> and reference the Purchase Order number once one is issued by Procurement Services.

When do I check off: <u>"Route to Procurement</u> <u>Services" on a Non-</u> <u>Catalog Item</u> <u>Requisition?</u>

For All Contracts: Service – Maintenance Contracts, Multi-Year Contracts, Contract Renewals, All Services – Regardless of Cost, Non-Compliant/Non-Delegated Purchases

Procurement Services procurement@tamuk.edu 361-593-3814

Items to Remember

Contracted vendors and HUB vendors should be sought out first for your procurement needs; **never** authorize services before obtaining an authorized purchase order.

Utilize the Procurement & Travel Services website for information on the procurement process. https://www.tamuk.edu/finance/procurement/purchasing