

Title: Single Item Purchase \$2K and Above Procedures
Department: PPM Financial Services
Effective Date: November 28, 2023

PURPOSE

To establish standard operating procedures for Physical Plant Management (PPM) for the procurement of a single item \$2000 and above using the P-Card.

RESPONSIBILITY

PPM is responsible to adhere to University procurement guidelines.

Employee is responsible to obtain proper approvals and quote(s) prior to purchase.

Distribution Center is responsible to purchase the item with the P-Card.

Asset Management is responsible to determine tagging requirements and tag campus equipment.

PPM Financial Services is responsible to work with Purchasing on the procurement waiver and Accounts Payable on required documentation.

PROCEDURES

When an employee requests to purchase an item in excess of \$2000 and above (currently **\$1,826.48 plus 9.5% sales tax in 2023**), the following guidelines apply:

1. Employee provides an approved *Special Order Request* (SOR) form and quote(s) to Distribution Center. *If possible, the employee may provide a picture of item, location or shop, and additional quotes.*
2. Distribution Center:
 - a) Reviews specifications and quote(s) to determine if better pricing is available. *Note: If better pricing is available, the final vendor may be different than that on the original request.*
 - b) Coordinates with Asset Management to review asset tagging requirements and secures Asset Management review signature on the SOR.
 - c) Reviews and forwards all documents to PPM Financial Services email at ppm.finance@csun.edu.
3. PPM Financial Services determines the funding source and may also source better pricing to be noted on documentation.
4. PPM Financial Services requests P-Card waiver via CSUN Self Service Page (TopDesk) with all supporting documents and Asset Management reviewed SOR to Purchasing. TopDesk: Home > Purchasing & Contract Admin > PCard > General Waiver Request
5. Distribution Center makes the purchase with approved wavier #.
All Items should be delivered to Receiving/Asset Management for final review and tagging if needed.
6. PPM Financial Services enters wavier # on statement to Accounts Payable.

SPECIAL NOTES

Single item is \$1,826.48 plus current (2023) sales tax of 9.5%. Shipping, accessories, and fees are not included.

Equipment deemed taggable should be procured via a purchase order except in the case of an emergency (fire, life, safety), the vendor does not accept POs (i.e., Home Depot), online orders and payment only (i.e., Amazon), the item cannot be purchased with an Open PO, or a new requisition is required.

REFERENCES

Procurement Matrix <https://www.csun.edu/procure>

CSUN Self Service Page <https://csun.topdesk.net>

PPM *Special Order Request* (SOR) form

APPROVED


Jason R. Wang, Senior Director

11-28-23

Date

APPENDIX

