



Thomas Jefferson University

Research Administration Center of Excellence

Purchasing Town Hall

September 15th, 2014

For Discussion Purposes Only

Agenda



- RACE Purchasing Coordinators
- P Card Update
- Requisition Form
- PI Designee Letter
- Ascent Update
- Purchasing FAQ

RACE Purchasing Coordinators

RACE Purchasing Coordinators



What services will RACE provide as they relate to purchasing?

Services Provided by RACE Purchasing Coordinators

- 1) Places orders in Ascent upon receipt of Requisition Form
- 2) Monitors RacePurchases@jefferson.edu email account for potential purchasing requests
- 3) Follows up with:
 - PO #
 - Cost of purchase
 - Requisition #

*When using Requisition Form

Services Provided by RACE Grants Administrators

- 1) Approves orders on sponsored accounts placed with P Card
- 2) Approves orders on sponsored accounts placed in Ascent

RACE Purchasing Coordinators



- **Mike Jones-** Purchasing and Team 3 Lead
 - Email: Maj004@jefferson.edu
 - Phone: x 5-4323
- **Sofia Cano-** Purchasing Coordinator
 - Email: Sxc099@jefferson.edu
 - Phone: x 5-4821
- **Diane Glynn-** Purchasing Coordinator
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RACE Purchasing Coordinators



How has the RACE purchasing cluster affected procurement at TJU thus far?

Since Go Live: the RACE purchasers have created 180 requisitions in Ascent and approved 280 requisitions. Additionally the RACE purchasers have placed 40 P-Card orders. The departments currently using the RACE purchasers are: Neuroscience, Dermatology, Cancer Biology, Radiation Oncology.

P Card Update

P Card Update



At a high level, what has changed about using my P Card?

Some of your P Cards have been updated to have RACE in the “Approver” Role. Now that RACE is approving:

- All P Card reconciliations must be completed by the 23rd of the month, prior to the P Card Approval deadline which is on the 26th of the month.
- If reconciliations are late 2 or more times, Purchasing will be notified and escalations steps may be taken (including deactivation of the P Card).
- All purchasing documentation must be sent to racepurchases@jefferson.edu.
 - According to Jefferson’s P Card Policy proper documentation is one document for a transaction to include:
 - What was ordered
 - The price it was ordered at
 - Where it is to be delivered/ proof of receipt
 - The vendor specifications
 - The business purpose for the transaction
- It is requested that the transactions are reviewed on a weekly basis.

P Card Update

What level of detail is necessary to include in Payment Net?

General Information
Addendum
History
8 of 57

Save Add Lines Dispute

Settlement Method Commercial Card

Transaction Type Purchase

Account Number *****5254

Transaction Date 08/26/14

Post Date 08/27/14

MCC 5047

Merchant OPERON BIOTECHNOLOGIES I
256-704-8200 , AL, US

Original Merchant OPERON BIOTECHNOLOGIES I

Parent Merchant OPERON BIOTECHNOLOGIES I

Exported

Customer Code

Micro Reference 24246514238207899600315

Authorization Number 003203

Transaction ID 1482630381001

Original Currency USD

Original Amount \$78.10

Tax \$0.00

Settlement Currency USD

Total \$78.10

Approval Status

Reviewed

Approval1 Dilanni, Samuel

New

Accounting Codes

Chart of Accounts COA - US90088

Division/Dept/NatAcct * Div/dept/aoc

Program Class Produc

Transaction Custom Fields

Transaction Notes

for PI lab; general description of items ordered; allocation method

2933 characters remaining.

Item	Item Description	# of Units	Unit Price	Taxable	%	Total	

Requisition Form

Requisition Form



Grant/Contract Procurement Requisition Form
 Please e-mail completed form to: RACEPurchases@jefferson.edu

For RACE Procurement Services Only -
 PO#

Request date:						
Requestor Name:		Requestor E-mail:				
Requestor Department:		Requestor Phone:				
Vendor Information		Order Information				
Company Name:	Enter Vendor Name	Ship To Department:	Enter the department the order should be shipped to			
Street Address:	Enter Vendor Address	Ship To PI name:	Name of the person the order should be addressed too			
City/State/Zip:		Street Address:				
Contact (if applicable):	Enter your Sales Rep or Vendor Contact Info	Building/Room#:	Enter the Building and location the order should be addressed too			
Phone:	Vendor Contact #	City/State/Zip:	Philadelphia PA 19107			
Website:	Vendor Website	Perishable?	<input checked="" type="radio"/> Yes <input type="radio"/> No			
E-mail:	E-mail of Vendor Contact or Vendor General e-mail	Estimated Delivery Date?				
Account Distribution Information						
TJU Grant Charge Code	Percentage	Grant Title/Identifier	Justification			
Enter the TJU Grant Code	%	Provide the grant title or grant identifier	<input checked="" type="checkbox"/> Experimental Design			
Example: 080-XXXX-XXXX-TJU Grant Code			<input type="checkbox"/> FTE			
Order Specifications						
Quantity	UOM	Vendor Catalog #	Description	Unit Price	Extended Price	Reference Quote/Promo Code(s)
2	each	12345	Sample item1	456	912	Promo G123
1	case	67890	sample item2	67.54	67.54	Quote 7896-TJU
					0	
					0	
					0	
					0	
Additional Comments:				This Page Total ->	979.54	
				Grand Page Total	979.54	
				Departmental Approval (if required)		
				PI/Delegate Approval ->		
				Print PI Name ->		
				RACE Approval ->		

Requisition Form



Step 1: Complete Purchasing Requisition Form

Grant/Contract Procurement Requisition Form		For RACE Procurement Services Only - PO#				
Requestor Name:		Requestor E-mail:				
Requestor Department:		Requestor Phone:				
Vendor Information		Order Information				
Company Name:	Enter Vendor Name	Ship To Department:	Enter the department the order should be shipped to			
Street Address:	Enter Vendor Address	Ship To Contact:	Name of the person the order should be addressed too			
City/State/Zip:		Street Address:				
Contract (if applicable):	Enter your Sales Rep or Vendor Contact Info	Building/Floor#:	Enter the Building and location the order should be addressed too			
Phone:	Vendor Contact #	City/State/Zip:				
Website:	Vendor Website	Perishable? (Y/N)	Is the order Perishable			
E-mail:	E-mail of Vendor Contact or Vendor General e-mail	Estimated Delivery Date?	When do you need the order by?			
Account Distribution Information						
Project/Grant	Percentage	Grant Title	Justification			
Enter the T&E Grant Code	%	Provide the grant title or grant identifier	Please provide your allocation method:			
			1) Experimental design			
			or			
			2) FTE			
Order Specifications						
Quantity	UOM	Vendor Catalog #	Description	Unit Price	Extended Price	Reference Quote/Promo Code(s)
2	each	12345	Sample Item1	456	912	Promo 12323
1	case	67890	sample item2	67.54	67.54	Quote 7896-TJU
					0	
					0	
					0	
					0	
					0	
Additional Comments:				This Page Total ->	979.54	
				Grand Page Total	979.54	
				Departmental Approval (if required)		
				Print Delegate Approval ->		
				Print PI Name ->		
				RACE Approval ->		

Step 2: Email Form to RacePurchases@jefferson.edu

Step 3: Expect to receive the following from your RACE Purchaser:

- PO #
- Cost of purchase
- Requisition #

PI Designee Letter



Principal Investigator (PI) Approval Form	
Single Designee	
If you wish to authorize a single Designee for approval of all ordering for multiple projects, please list all TJU grant information below. Please complete, sign and, save this form then e-mail to RacePurchases@Jefferson.edu .	
TJU Grant Information:	
Designee Name:	Click here to enter text.
Grant Account #1:	
Sponsor Name:	Click here to enter text.
Sponsor Award Number:	Click here to enter text.
Grant Title:	Click here to enter text.
TJU Account Number:	Click here to enter text.
Grant Account #2:	
Sponsor Name:	Click here to enter text.
Sponsor Award Number:	Click here to enter text.
Grant Title:	Click here to enter text.
TJU Account Number:	Click here to enter text.
Grant Account #3:	
Sponsor Name:	Click here to enter text.
Sponsor Award Number:	Click here to enter text.
Grant Title:	Click here to enter text.
TJU Account Number:	Click here to enter text.
Grant Account #4:	
Sponsor Name:	Click here to enter text.
Sponsor Award Number:	Click here to enter text.
Grant Title:	Click here to enter text.
TJU Account Number:	Click here to enter text.
Grant Account #5:	
Sponsor Name:	Click here to enter text.
Sponsor Award Number:	Click here to enter text.
Grant Title:	Click here to enter text.
TJU Account Number:	Click here to enter text.
<p><i>I the Principal Investigator for the above-referenced TJU Account Numbers hereby authorize this purchasing designee to request orders on my behalf. Prior to requesting the order, as required, I will review and discuss the order requests with this Designee to ensure all orders adhere to all university, sponsor, and federal guidelines and regulations of the grant accounts that I am charging.</i></p> <p><i>I am certifying that all purchases processed by my designees are allocable to the specific aims of each grant prior to ordering.</i></p>	
PI Name:	
PI Signature:	
Departmental Administrator Name:	
Departmental Administrator Signature:	

Ascent Update

Ascent Update



How do I properly use Ascent?

Requisition Lines

Requisition Lines

Quantity UOM Price Total Vendor Name Line Description

1 [product desc](#) EMD MILLIPORE CORPORATION 1.0000

Each

0.00000 0.00



Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1

Status: Active *Ship To: 1JHN010100

Attention To: Jones, Michael/Dalva Lab

[Modify Onetime Address](#)

[Add Shipto Comments](#)

Quantity: 1.0000 Due Date: 07/30/2014 Price: 0.00000

SpeedChart: *Distribute By: Qty

Accounting Lines

Customize | Find | View All | First 1 of 1 Last

[Chartfields1](#) [Chartfields2](#) [Chartfields3](#) [Details](#) [Details 2](#) [Asset Information](#) [Asset Information 2](#)

AM Business Unit	Profile ID	Tag Number	CAP #	Sequence	Empl ID	Add row	Delete row
AM Business Unit <input type="text"/>	Profile ID <input type="text"/>	Tag Number <input type="text"/>	CAP # <input type="text"/>	Sequence <input type="text"/>	Empl ID <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Ascent Update

Below are screen shots of Ascent:

Line Comments

Business Unit: TJU Requisition Date: 07/28/2014
Requisition ID: NEXT Status: Pending Line: 1

Comments

Find First 1 of 1 Last

[Use Standard Comments](#) Entered On: 07/28/2014 8:03:15PM + - 1

<< enter any notes here like sales rep contact/quote/promo,etc >>

Send to Vendor Show at Receipt Show at Voucher

Add Attachments

Comments

Comments

[More Comments](#)

enter justification here and attach order forms and quotes

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

[Find more items](#)

Save & submit

Cancel requisition

Save & preview approvals

Purchasing FAQ



Why are these changes in requirement happening now?

With the RACE Go Live, TJU has identified further opportunities for improvement as they relate to maintaining institutional integrity. RACE looks forward to collaborating with faculty and designated requestors in order to protect TJU and maintain compliance.

What is RACE doing to make sure the order gets to my Lab?

RACE Purchasing Coordinators are sending Purchase Orders, following up with the vendor, reviewing receipts in Ascent, as well as following up with departments for packing slips.

Is RACE processing the Purchase Orders?

Race is a separate entity from Supply Chain Management who processes the Purchase Orders. RACE does not dispatch nor set up Purchase Orders.

Where do I go for assistance?

If you need assistance please contact Michael Jones, the RACE Purchasing coordinators, or Email RACEPurchases@jefferson.edu.

Purchasing FAQ



Why is justification needed?

It is important for RACE to understand the logic behind the provided grant number to ensure the correct account number is being used for the right reasons. It is important to know that the requestor is personnel directly designated by the PI. It is also important to have justification to ensure that a typing error has not occurred. These measures are taken in order to protect the integrity of TJU.

What is an example of an appropriate justification?

1. For PI lab; allocation based on experimental design “ Federal ID number”
2. For PI lab; allocation based on lab’s FTE
3. For PI lab; allocation based on experimental design 50% to “Fed ID number” and 50% to “Foundation identifier”



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