

**JACKSONVILLE STATE UNIVERSITY**  
**Manual of Policies and Procedures**

**POLICY NO.: IV:03:01**

**DATE: May 1, 1987**

**REVIEW/REVISION DATES: Apr 1993, Jun 2003, Mar 2004, Sep 2008, Aug 2011, Jan 2013, Jan 2015, Jul 2016, Sep 2017, Jul 2018, May 2022, Oct 2022, Mar 2024, June 2025**

**SUBJECT: Purchasing Guidelines and Procedures**

**APPROVED: Dr. Don C. Killingsworth, Jr., President**

**PURPOSE**

This policy establishes and documents Jacksonville State University (JSU or University) guidelines concerning the purchasing of goods and services.

**POLICY**

The Office of Procurement & Fixed Assets has the responsibility for purchasing all supplies, equipment, repairs of equipment/buildings, and services needed by the various departments of JSU. The purchasing process is regulated by State of Alabama Law, along with other applicable state statutes and regulations, by governing board policies, and by JSU policy. Within these constraints, every effort is made by the Office of Procurement & Fixed Assets to accommodate the procurement needs expeditiously and efficiently of the University.

Only the Office of Procurement & Fixed Assets is authorized to make commitments for supplies, equipment, and services necessary for the operation of JSU, except for a limited number of employees issued a Purchasing Card, with permission to make small purchases from a limited merchant list. (Reference *Purchase Card Policy* IV:03:11 for more information). Commitments are made in accordance with JSU Policies and Procedures. JSU **is not** responsible for purchases or contracts approved by an individual except as authorized by:

- (1) The President of the University.
- (2) The Senior Vice President for Finance & Administration/CFO of the University.
- (3) The Director of Procurement & Fixed Assets for the University.

**Only the individuals in the positions listed above are authorized to sign contracts for the University.**

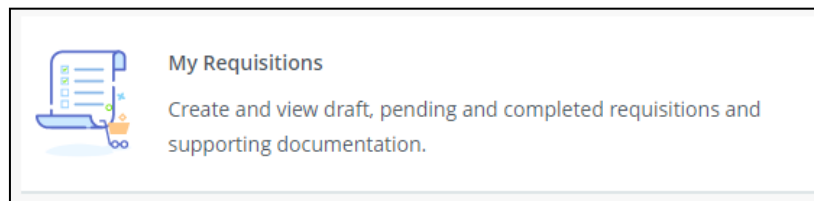
To ensure that contracts are both legally and financially viable, any agreement / understanding / contract **must be** routed in the following manner:

- (1) Director/Vice President of the requesting division/department.
- (2) University Counsel for legal vetting and approval.
- (3) Senior Vice President for Finance & Administration/CFO for financial vetting and approval.
- (4) President and/or Board of Trustees as appropriate for final University approval.

The University will assume **no liability** for the payment of purchases except those made through approved purchasing procedures.

### **PURCHASE REQUISITIONS**

All requests for services and supplies must be submitted using the Banner 9 Finance SSB purchase requisition form and must be approved electronically per the Expense Authorization Matrix in Policy 1.05.03. Screenshot of link to My Requisitions in Banner 9 Finance SSB:



Instructions for entering and approving purchase requisitions in the Banner system can be found on the Finance & Administration “[Procedures and Instructions](#)” webpage. A full description of each item to be purchased should be included, as well as dates for items such as subscriptions or rentals. Requisitions should be entered and approved far enough in advance to allow sufficient time for review in the Office of Procurement & Fixed Assets. Requisition numbers are assigned electronically when a requisition has been completed.

Approvers will review requisitions and approve/disapprove online. When requisitions have been approved electronically per the Expense Authorization Matrix in Policy 1.05.03, they are automatically transmitted to the Office of Procurement and Fixed Assets. After the purchase has been reviewed and it is confirmed that all required documentation is attached electronically to the requisition, a purchase order will be issued. Once all electronic approvals are recorded, purchase orders are usually issued within two business days.

A purchase should not be made until a purchase order has been issued and signed by the Director of Procurement & Fixed Assets, or designee. When a purchase order is issued, electronic copies are distributed as follows: The vendor copy and receiving copy are emailed to the originating requisitioner for distribution. (NOTE: Upon the complete receipt of goods or services, the receiving copy should be signed by the budget manager, dated, and sent to Accounts Payable.). One electronic file copy should be sent to Accounts Payable.

#### **PURCHASES REQUIRING ADDITIONAL DOCUMENTATION**

1. Computer hardware (systems, mobile devices, peripherals) and software purchases that meet any of the criteria below require a Request to Purchase Computer Hardware / Software form ([CAQ:01:R4](#)). This form must be completed and approved by the budget manager and the Chief Information Officer.
  - Purchase with an individual item cost of \$500 or more.
  - Software or services that require any integration with current JSU systems.
  - Software that requires installation on a JSU system, server, or computer.
  - Hardware or peripherals that require a connection to JSU's network.

In addition to the above items, the following physical security technologies (software or hardware) must also be approved by the Chief Information Officer and the Associate Vice President of Health & Public Safety.

- Security/Surveillance Cameras.
- Access Control Systems.
- Physical Security Systems.
- License Plate Readers.
- Door Readers and intercom systems.



2. Purchases for food or beverages must include the Request for Meal Purchase ([Form 22](#))

The screenshot shows a web browser window with the title "Request for Meal Purchase". The page header includes the Jacksonville State University logo and contact information: "Jacksonville State University, Jacksonville, AL 36208, Phone: (205) 782-5152". The form itself is titled "Request for Meal Purchase" and contains several sections:

- Date/Time/Location of Event:** A text input field.
- Business Purpose of Event:** A dropdown menu with "Please Select" as the current selection.
- Requester #:** A text input field.
- Vendor Name:** A text input field.
- Vendor Number:** A text input field.
- Banner Budget Number:** A text input field.
- Listing of attendees:** A section for listing attendees, with a note: "For more than five JSU employees, attach justification from the budget manager below:". It includes two columns: "Name" and "Relationship To JSU", each with multiple rows for entry.
- Justification:** A section with a note: "Please attach justification from budget manager, if required." and a "Choose File" button. Below this is a note: "Files over 25 MB will not be accepted".
- Attached Business Purpose of Event:** A text input field.
- Attach Event Agenda:** A section with a "Choose File" button and a note: "Files over 25 MB will not be accepted".
- Budget Manager Information:** A section with a note: "Please enter the Budget Manager's name and JSU E-Mail Address:". It includes two text input fields: "Budget Manager First Name" and "Budget Manager Last Name", and a dropdown menu for "Budget Manager JSU E-Mail Address".

More information on meal/beverage purchases is provided in [Policy IV.03.05](#). Approved Request for Meal Purchase forms must be attached to the requisition before submitting for approval.

3. Requisitions that reference another document, such as a quote or a listing, should not be submitted until the referenced document is attached to the requisition in Banner 9 Finance SSB.
4. Purchases for airline tickets, conference registrations or any other purchase that involves out-of-state, international, or in-state exceptions travel must include, as part of purchase documentation, a copy of an approved Request for Travel Authorization (Form 19: [Form](#)) for any employee traveling on JSU business.
5. Purchases that require pre-payment must include an original invoice with the requisition attachments. "Please pre-pay" should be entered in the "public comments" section of the requisition.

## **PURCHASING WITH FEDERAL FUNDS**

Purchases using federal funds must adhere to regulations found in the *Office of Management and Budget (OMB) Uniform Guidance* sections 200.317-200.326. These regulations explain administrative requirements for colleges, universities, hospitals, and other non-profit organizations with federally funded grants and agreements. OMB *Uniform Guidance* identifies required procurement standards.

**All** purchases made with federal funds must be reviewed for compliance with the *OMB Uniform Guidance* by the Grant Accountant prior to issuance of the purchase order. The Purchasing Department is required to retain back-up documentation, such as bids, quotes, and cost/price analyses, on file for federal auditors.

If federal funds are being used, JSU will follow the small purchase procedures for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold defined by FAR 48 CFR 2.1. The current Simplified Acquisition Threshold is \$150,000. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources. (2 CFR 200.320 (b)).

### **Equipment and other Capital Expenditures with Federal Funds**

Per *OMB Uniform Guidance* section 200.349, capital expenditures for general purpose equipment, buildings, and land are unallowable as direct charges, except with prior written approval of the federal awarding agency or pass-through entity.

Per *OMB Uniform Guidance* section 200.349, capital expenditures for special purpose equipment are allowable as direct costs, if items with a unit cost of \$5,000 or more have the prior written approval of the federal awarding agency or pass-through entity.

## **AMENDMENTS TO PURCHASE ORDERS**

Once a purchase order is issued, other than shipping, new items cannot be added to the purchase order. A variance in price up to 10%, not to exceed \$50, per order may be processed without a purchase order amendment. Price increases that exceed \$50 will require a completed amendment form. The Purchase Order Amendment form ([Form #50](#)), available on the Office of Procurement & Fixed Assets website should be completed including the purchase order number, the FOAP, and the description, price, and quantity of the item to be changed. Amendment approvals follow the same electronic approval routing process as purchase orders.

**JSU**  
JACKSONVILLE STATE UNIVERSITY

Jacksonville State University  
Procurement and Fixed Assets  
700 Palmetto Rd. N. 32244-0001 Jacksonville, FL 32216  
Phone: (904) 762-5152

**Purchase Order Amendment**

Please verify that funds are available in your budget prior to submitting. Procurement cannot process if your budget does not have sufficient funds to cover. Approvals for PO amendments will be recorded and prioritized following the rules for the purchase order as documented on the Expense Authorization Matrix Policy (10/03). Amendments will not post to your PO until all approvals are recorded. Please use your approval(s) to monitor approval status in Banner if Expense 1000 order. Required Documents

Requestor:  Department:   
Email:  Description:   
Purchase Order #:  Vendor Name:   
Amendment #:  (1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72,73,74,75,76,77,78,79,80,81,82,83,84,85,86,87,88,89,90,91,92,93,94,95,96,97,98,99,100,101,102,103,104,105,106,107,108,109,110,111,112,113,114,115,116,117,118,119,120,121,122,123,124,125,126,127,128,129,130,131,132,133,134,135,136,137,138,139,140,141,142,143,144,145,146,147,148,149,150,151,152,153,154,155,156,157,158,159,160,161,162,163,164,165,166,167,168,169,170,171,172,173,174,175,176,177,178,179,180,181,182,183,184,185,186,187,188,189,190,191,192,193,194,195,196,197,198,199,200,201,202,203,204,205,206,207,208,209,210,211,212,213,214,215,216,217,218,219,220,221,222,223,224,225,226,227,228,229,230,231,232,233,234,235,236,237,238,239,240,241,242,243,244,245,246,247,248,249,250,251,252,253,254,255,256,257,258,259,260,261,262,263,264,265,266,267,268,269,270,271,272,273,274,275,276,277,278,279,280,281,282,283,284,285,286,287,288,289,290,291,292,293,294,295,296,297,298,299,300,301,302,303,304,305,306,307,308,309,310,311,312,313,314,315,316,317,318,319,320,321,322,323,324,325,326,327,328,329,330,331,332,333,334,335,336,337,338,339,340,341,342,343,344,345,346,347,348,349,350,351,352,353,354,355,356,357,358,359,360,361,362,363,364,365,366,367,368,369,370,371,372,373,374,375,376,377,378,379,380,381,382,383,384,385,386,387,388,389,390,391,392,393,394,395,396,397,398,399,400,401,402,403,404,405,406,407,408,409,410,411,412,413,414,415,416,417,418,419,420,421,422,423,424,425,426,427,428,429,430,431,432,433,434,435,436,437,438,439,440,441,442,443,444,445,446,447,448,449,450,451,452,453,454,455,456,457,458,459,460,461,462,463,464,465,466,467,468,469,470,471,472,473,474,475,476,477,478,479,480,481,482,483,484,485,486,487,488,489,490,491,492,493,494,495,496,497,498,499,500,501,502,503,504,505,506,507,508,509,510,511,512,513,514,515,516,517,518,519,520,521,522,523,524,525,526,527,528,529,530,531,532,533,534,535,536,537,538,539,540,541,542,543,544,545,546,547,548,549,550,551,552,553,554,555,556,557,558,559,560,561,562,563,564,565,566,567,568,569,570,571,572,573,574,575,576,577,578,579,580,581,582,583,584,585,586,587,588,589,590,591,592,593,594,595,596,597,598,599,600,601,602,603,604,605,606,607,608,609,610,611,612,613,614,615,616,617,618,619,620,621,622,623,624,625,626,627,628,629,630,631,632,633,634,635,636,637,638,639,640,641,642,643,644,645,646,647,648,649,650,651,652,653,654,655,656,657,658,659,660,661,662,663,664,665,666,667,668,669,670,671,672,673,674,675,676,677,678,679,680,681,682,683,684,685,686,687,688,689,690,691,692,693,694,695,696,697,698,699,700,701,702,703,704,705,706,707,708,709,710,711,712,713,714,715,716,717,718,719,720,721,722,723,724,725,726,727,728,729,730,731,732,733,734,735,736,737,738,739,740,741,742,743,744,745,746,747,748,749,750,751,752,753,754,755,756,757,758,759,760,761,762,763,764,765,766,767,768,769,770,771,772,773,774,775,776,777,778,779,780,781,782,783,784,785,786,787,788,789,790,791,792,793,794,795,796,797,798,799,800,801,802,803,804,805,806,807,808,809,810,811,812,813,814,815,816,817,818,819,820,821,822,823,824,825,826,827,828,829,830,831,832,833,834,835,836,837,838,839,840,841,842,843,844,845,846,847,848,849,850,851,852,853,854,855,856,857,858,859,860,861,862,863,864,865,866,867,868,869,870,871,872,873,874,875,876,877,878,879,880,881,882,883,884,885,886,887,888,889,890,891,892,893,894,895,896,897,898,899,900,901,902,903,904,905,906,907,908,909,910,911,912,913,914,915,916,917,918,919,920,921,922,923,924,925,926,927,928,929,930,931,932,933,934,935,936,937,938,939,940,941,942,943,944,945,946,947,948,949,950,951,952,953,954,955,956,957,958,959,960,961,962,963,964,965,966,967,968,969,970,971,972,973,974,975,976,977,978,979,980,981,982,983,984,985,986,987,988,989,990,991,992,993,994,995,996,997,998,999,1000,1001,1002,1003,1004,1005,1006,1007,1008,1009,1010,1011,1012,1013,1014,1015,1016,1017,1018,1019,1020,1021,1022,1023,1024,1025,1026,1027,1028,1029,1030,1031,1032,1033,1034,1035,1036,1037,1038,1039,1040,1041,1042,1043,1044,1045,1046,1047,1048,1049,1050,1051,1052,1053,1054,1055,1056,1057,1058,1059,1060,1061,1062,1063,1064,1065,1066,1067,1068,1069,1070,1071,1072,1073,1074,1075,1076,1077,1078,1079,1080,1081,1082,1083,1084,1085,1086,1087,1088,1089,1090,1091,1092,1093,1094,1095,1096,1097,1098,1099,1100,1101,1102,1103,1104,1105,1106,1107,1108,1109,1110,1111,1112,1113,1114,1115,1116,1117,1118,1119,1120,1121,1122,1123,1124,1125,1126,1127,1128,1129,1130,1131,1132,1133,1134,1135,1136,1137,1138,1139,1140,1141,1142,1143,1144,1145,1146,1147,1148,1149,1150,1151,1152,1153,1154,1155,1156,1157,1158,1159,1160,1161,1162,1163,1164,1165,1166,1167,1168,1169,1170,1171,1172,1173,1174,1175,1176,1177,1178,1179,1180,1181,1182,1183,1184,1185,1186,1187,1188,1189,1190,1191,1192,1193,1194,1195,1196,1197,1198,1199,1200,1201,1202,1203,1204,1205,1206,1207,1208,1209,1210,1211,1212,1213,1214,1215,1216,1217,1218,1219,1220,1221,1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## OPEN PURCHASE ORDERS

Open purchase orders may be placed periodically covering any period of time within a fiscal year, not to exceed twelve (12) months for items of a continuing nature, such as office supplies. Each department should keep a record of all prior payments against an open purchase order.

## PREPAID PURCHASE ORDERS

Some types of purchases by their nature must be prepaid. Examples of this type of purchase are subscriptions, some conference registrations, and maintenance contracts. For these types of payments, “Please Pre-pay” should be entered into the public comments section of the requisition. An original invoice must be attached to the requisition before submitting for approval to process this type of purchase.

Requests for prepayment exemptions, with a detailed justification documenting procurement due diligence, must be made via email to the Director of Procurement and Fixed Assets for approval review by the CFO. Exemptions will be granted on an extremely limited basis.

A prepayment **cannot** be processed without an invoice. Prepaid purchase orders are discouraged and should be placed only when necessary. Purchases of supplies, equipment, and services cannot be prepaid.

## RECEIPT OF GOODS OR SERVICES

When an order has been received, the budget manager will sign the receiving copy of the purchase order and forward it to Accounts Payable. If a partial shipment of an order is received, the Partial Shipment form ([Form #13](#)) should be completed, signed by the budget manager, and forwarded to Accounts Payable.

Form 13:

[illegible]



## **INTER-DEPARTMENTAL PURCHASES**

All inter-departmental purchases will be accounted for with the Internal Transaction Voucher ([Form #31](#)). This form should be completed by the budget manager of the account being charged. The approved form is sent to the Controller for processing.

[Click to Reset Form and Erase All Text](#)

JACKSONVILLE STATE UNIVERSITY  
INTERNAL TRANSACTION VOUCHER

<small>CHARGE ACCOUNT:</small>	<small>CREDIT ACCOUNT:</small>
<small>Name:</small> <input style="width: 90%;" type="text"/>	<small>Name:</small> <input style="width: 90%;" type="text"/>
<small>Number:</small> <input style="width: 90%;" type="text"/>	<small>Number:</small> <input style="width: 90%;" type="text"/>
<small>Date Received Goods or service:</small> <input style="width: 90%;" type="text"/>	
<small>(Attach copy of statement signed by receiver of goods or service.)</small>	
<small>Number:</small> <input style="width: 90%;" type="text"/>	
<small>Brief description of goods or service received:</small>	
<input style="width: 98%;" type="text"/>	
<input style="width: 98%;" type="text"/>	
<input style="width: 98%;" type="text"/>	
<input style="width: 98%;" type="text"/>	
<small>Total Cost:</small> \$ <input style="width: 150px;" type="text"/>	
<small>Signature of Charge Account Budget Unit Manager:</small>	
<input style="width: 98%;" type="text"/>	
<small>Signature:</small>	<small>Date:</small>
<input style="width: 450px;" type="text"/>	<input style="width: 100px;" type="text"/>

BUSINESS OFFICE:

JV #:

Date:

Audited:

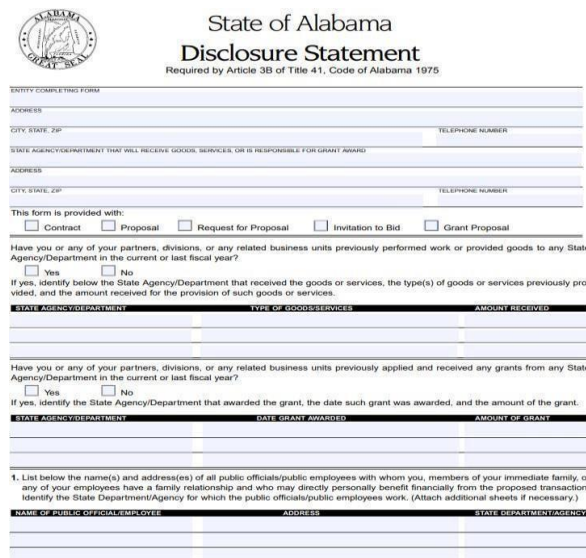
Form 31

## **STATE OF ALABAMA LAW**

State law affects the acquisition process for goods and services at JSU. Per Article 5 of Section 41 – 4 of the Code of Alabama, any purchase request or contract for like or similar products and/or services that exceeds JSU's small dollar purchase threshold of \$25,000 must be competitively bid. A purchase request or contract cannot be split up to avoid the \$25,000 bid threshold. Certain related items will be combined when determining if the \$25,000 threshold is applicable. Quantities of items having the same or equal specifications will be combined and bid so that JSU will benefit from quantity discounts. Multiple orders will not be placed to avoid the law. It is JSU practice to procure goods and services from reliable sources at the appropriate distribution level that offers the material or services at the lowest cost for the quality and service necessary.

## **STATE OF ALABAMA DISCLOSURE STATEMENT REQUIREMENT**

The State of Alabama requires that a Vendor Disclosure Statement be completed for all proposals, bids, contracts, or grant proposals more than \$25,000. In compliance with this requirement (Code of Alabama Title 41, Article 3B, Section 41-16-82) the completed Vendor Disclosure Statement is required by the Office of Procurement & Fixed Assets. The notarized form must be attached to the requisition before submitting for approval and purchase order processing. The vendor will not be paid without the completed Vendor Disclosure Statement, available online: [AL-Vendor-Disclosure-Statement](#)



The form is titled "State of Alabama Disclosure Statement" and is required by Article 3B of Title 41, Code of Alabama 1975. It includes a header with the Alabama state seal. The form is divided into several sections: 1. Vendor Information: Fields for Address, City, State, ZIP, and Telephone Number. 2. State Agency/Department Information: Fields for State Agency/Department, Address, City, State, ZIP, and Telephone Number. 3. Transaction Type: A section with checkboxes for Contract, Proposal, Request for Proposal, Invitation to Bid, and Grant Proposal. 4. Previous Work/Grants: A section asking if the vendor or its partners have previously performed work or provided goods to any State Agency/Department, with a table for recording such transactions. 5. Current Grants: A section asking if the vendor or its partners have applied for and received any grants from any State Agency/Department in the current or last fiscal year, with a table for recording such grants. 6. Public Officials/Employees: A section asking to list the names and addresses of all public officials/public employees with whom the vendor, its family, or its employees have a family relationship and who may directly personally benefit financially from the proposed transaction. The form is a standard legal document with a header, body, and footer.

## **SALES TAX**

The University is exempt from the payment of State of Alabama sales taxes. It is the practice of the Office of Procurement & Fixed Assets to establish the tax status on purchase orders. The Office of the Controller will provide evidence of the tax exemption if required by a vendor. This is accomplished either at the time the order is issued or at the time of payment when taxes are deducted from vendor invoices by the University Accounts Payable Office. JSU's State Tax Exemption number (8-409) is included on the purchase order.

### **DELIVERIES AND RECEIVING:**

It is University practice to direct shipments to the location of the user. It is the responsibility of the requisitioning department to immediately inspect the shipment; in case of any problems, appropriate procedure should be followed to correct the problem. All invoices with the purchase order number and/or account number indicated are to be forwarded immediately to Accounts Payable with the receiving copy of the purchase order.

### **DIRECT VOUCHERS**

Direct vouchers are payments for goods/services for which no purchase order was processed. This type of payment is primarily used in emergency situations when it is not possible to process a purchase order. All direct vouchers must include a copy of the encumbrance printed from Banner Finance SSB, an invoice, an explanation of the reason why the purchasing policy was not followed, and approval(s) per the [Expense Authorization Matrix - I.05.03.01](#).

For emergency purchases, enter a direct voucher on the encumbrance form in the Banner System and attach the invoice to a copy of the encumbrance printed from the Banner self-service screen. Before emergency orders can be approved by the Director or Procurement & Fixed Assets, the purchase request must be supported by written justification (explaining the reason for the emergency purchase and why the standard purchasing policy could not be followed). If approved, the encumbrance will be forwarded to Accounts Payable for payment.

Until approved, the purchase is an obligation of the individual making the purchase. Direct vouchers must be signed by the budget manager and approved per the Expense Authorization Matrix in Policy I.05.03, then forwarded with the invoice and other required documentation to the Office of Procurement & Fixed Assets via email at [purchasing@jsu.edu](mailto:purchasing@jsu.edu). If funds are grant related, the direct voucher must be reviewed and signed by the Grant Accountant.

Direct vouchers are also used in situations where needed items are available only from a vendor that does not accept purchase orders or when item cost is substantially lower from a vendor that will not accept purchase orders. These types of purchases are limited to \$300.00. Budget managers should follow the steps listed below to use direct vouchers in this manner.

1. Obtain verbal approval from the Director of Procurement & Fixed Assets prior to the purchase.
2. Establish with the vendor at the time of purchase that the purchase is for JSU and, therefore, exempt from State sales tax.
3. Obtain approval from the budget manager.
4. When the goods have been received, submit the direct voucher to the budget manager with an itemized invoice to process payment to vendor or reimbursement to an individual. Forward to the Office of Procurement & Fixed Assets via email at [purchasing@jsu.edu](mailto:purchasing@jsu.edu). If funds are grant related, the direct voucher must be reviewed and signed by the Grant Accountant.

The purchase of the following items does not require a purchase order, and payment should be processed using a direct voucher.

- Gasoline credit card payments
- Professional fees (example: attorneys)
- Insurance, bonds
- Utilities
- Payroll taxes/other expenditures paid directly from a balance sheet account

### **CONFLICT OF INTEREST**

It is the responsibility of all employees of JSU and the Office of Procurement & Fixed Assets to take all appropriate steps to prevent the University from knowingly entering any purchasing commitment that could result in a conflict-of-interest situation.

**PERSONAL PURCHASES**

It is the responsibility of all faculty, staff, and the Office of Procurement & Fixed Assets to take all appropriate steps to assure that the University does not knowingly enter into any purchase commitment for personal use.

**RESPONSIBILITY**

The Senior Vice President for Finance & Administration/CFO is responsible for this policy.

**EVALUATION**

This policy will be reviewed at least every five (5) years by the Director of Procurement & Fixed Assets.