Agenda

- RACE Purchasing Coordinators
- P Card Update
- Requisition Form
- PI Designee Letter
- Ascent Update
- Purchasing FAQ
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
  - Email: Dxg103@jefferson.edu
  - Phone: x 3-5026
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.
What level of detail is necessary to include in Payment Net?
Requisition Form
# Requisition Form

**Grant/Contract Procurement Requisition Form**

Please e-mail completed form to: RACEPurchases@jefferson.edu

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### Vendor Information

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Vendor Name</th>
<th>Ship To Department</th>
<th>Ship To Name</th>
<th>Order Address</th>
<th>Order Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>City/State/Zip</th>
<th>Street Address</th>
<th>City/State/Zip</th>
<th>Street Address</th>
<th>Contact Rep</th>
<th>Vendor Contact Info</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Phone</th>
<th>Website</th>
<th>Email</th>
</tr>
</thead>
</table>

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### Account Distribution Information

**Till Grant Code**

- **Percentage**: Provide the grant info or grant identifier
- **Grant Identifier**: Examples: 0123-0456-0789-TJU Grant Code

### Justification

- Enter the Till Grant Code
- Provide the grant info or grant identifier
- Justify the grant

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### Order Specifications

<table>
<thead>
<tr>
<th>Quantity</th>
<th>UOM</th>
<th>Vendor Catalog #</th>
<th>Description</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>each</td>
<td>12345</td>
<td>Sample Item 1</td>
<td>45.66</td>
<td>92</td>
</tr>
<tr>
<td>1</td>
<td>case</td>
<td>67890</td>
<td>Sample Item 2</td>
<td>67.54</td>
<td>67.54</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Order Specification</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Reference Quote/Order Code(s):**

- Promo 0123
- Quote 7896-TJU

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### Additional Comments:

- This Page Total: 597.54
- Grand Page Total: 597.54

- Departmental Approval (if required)
- PI Delegate Approval
- PI Name:
- RACE Approval:

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Requisition Form

Step 1: Complete Purchasing Requisition Form

- Complete Purchasing Requisition Form
- Email Form to RacePurchases@jefferson.edu
- Expect to receive the following from your RACE Purchaser:
  - PO #
  - Cost of purchase
  - Requisition #
**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 Procurements@jefferson.edu.

<table>
<thead>
<tr>
<th>TJU Grant Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Designee Name:</td>
<td>Click here to enter text.</td>
</tr>
<tr>
<td>Sponsor Account #:</td>
<td>Click here to enter text.</td>
</tr>
<tr>
<td>Sponsor Award Number:</td>
<td>Click here to enter text.</td>
</tr>
<tr>
<td>Grant Title:</td>
<td>Click here to enter text.</td>
</tr>
<tr>
<td>TJU Account Number:</td>
<td>Click here to enter text.</td>
</tr>
</tbody>
</table>

**Grant Account #2:**

| Sponsor Name: | Click here to enter text. |
| Sponsor Account #: | 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 Account #: | 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 Account #: | 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 Account #: | Click here to enter text. |
| Grant Title: | Click here to enter text. |
| TJU Account Number: | Click here to enter text. |

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 chartering.

I am certifying that all purchases processed by my designee are allocable to the specific aims of each grant prior to ordering.

| PI Name: |  |
| PI Signature: |  |
| Departmental Administrator Name: |  |
| Departmental Administrator Signature: |  |
Ascent Update
## Ascent Update

### How do I properly use Ascent?

#### Requisition Lines

<table>
<thead>
<tr>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Vendor Name</th>
<th>Line Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Each</td>
<td>0.0000</td>
<td>0.00</td>
<td>EMD MILLIPORE CORPORATION</td>
<td>1.0000</td>
</tr>
</tbody>
</table>

- **Consolidate with other Reqs:** [ ]
- **Override Suggested Vendor:** [ ]

**Shipping Line:** 1

**Status:** Active  
**Ship To:**  
**Attention To:** Jones, Michael  
**Modify Onetime Address:**  
**Add Shipto Comments:**

**Due Date:** 07/30/2014  
**Price:** 0.0000

**SpeedChart:**

**Distribute By:** [ ]

#### Accounting Lines

<table>
<thead>
<tr>
<th>AM Business Unit</th>
<th>Profile ID</th>
<th>Tag Number</th>
<th>CAP #</th>
<th>Sequence</th>
<th>Empl ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM Business Unit</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

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Ascent Update

Below are screen shots of Ascent:
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”