



# Purchasing Department Quick Reference Guide

## Contact

[Purchasing@essex.edu](mailto:Purchasing@essex.edu)

973-877-3037

**Denise Williams**, *Director of Purchasing*  
[dwilli53@essex.edu](mailto:dwilli53@essex.edu) | 973-877-4476

**Rosa Reyes**, *Associate Director*  
[reyes@essex.edu](mailto:reyes@essex.edu) | 973-877-3038

**Habiba Jamali**, *Assistant Director*  
[jamali@essex.edu](mailto:jamali@essex.edu) | 973-877-3025

**Yenny Mendoza**, *Administrative Assistant*  
[mendoza@essex.edu](mailto:mendoza@essex.edu) | 973-877-3408

Please access all purchasing forms at: <https://www.essex.edu/finance-forms>

**The Purchasing department in collaboration with Accounts Payable and the Office of the General Counsel aim to support the mission of the College by:**

- ✦ Providing the highest quality of customer service to all faculty, staff and vendors of the College.
- ✦ Procuring goods and services most efficiently and cost-effectively including strategically sourcing through all available means.
- ✦ Ensuring that all purchases comply with the College's guidelines and the State of New Jersey's [Contracts Law](#).
- ✦ Reviewing and executing College contracts.

## **1. Check Request (CR) Process:**

**This process is used to request payment to companies and individuals for items including:**

- ✦ Membership Dues
- ✦ Conference Registrations
- ✦ Legal Settlements
- ✦ Travel Request and Business Reimbursements (use form ECC 302, the College will book hotel, air, and train reservations)
- ✦ Long-term College-approved vendors on the premises (Example: Cafeteria, Bookstore, Aflac, etc.)

## **2. Purchase Requisitions (PR) Process:**

**The requisition must be entered in Banner before any purchase of goods or services.**

**For purchase of goods and services that are not mentioned in the check request process such as toner, consultants, subscriptions, software/hardware, promotional items, repairs, office supplies, furniture, computers, etc.**

- ✦ Supporting documents are required (quote/invoice, specifications, contract, etc.)
- ✦ Board approval is required for goods or services above \$17,500
- ✦ Purchases over \$41,600 may require the bidding process which takes 60 – 90 days (contact purchasing for guidance).

### 3. Vendor Payments

The Accounts Payable Department is responsible for making payments.

#### The Vendor's Responsibilities:

- ✦ The vendor **must** add the **Purchase Order (PO)** number to the invoice.
- ✦ The vendor **must** email the invoice that includes a PO number to [accountspayable@essex.edu](mailto:accountspayable@essex.edu)

**Note:** Vendors, please be aware that payment will only be made after the requesting ECC department has verified and confirmed that they have received your goods and/or service as indicated on the invoice.

#### Essex County College's Responsibilities:

- ✦ Accounts Payable (AP) is the central point to receive all Vendor Invoices and send them to the respective Departments for payment approval.
- ✦ The ECC-authorized person (department head/receiver) who requested the vendor's goods and/or services **must verify and sign** the vendor invoice and **immediately return** it to Accounts Payable (AP) via email-at [accountspayable@essex.edu](mailto:accountspayable@essex.edu)
- ✦ If the Requesting Department receives the Invoice with the product or directly from the Vendor, the responsible person **must add the PO number, sign** the vendor invoice, and **send** it to Accounts Payable (AP) via email at [accountspayable@essex.edu](mailto:accountspayable@essex.edu)
- ✦ **Please note:** Invoices received by Accounts Payable Department without a PO in place for goods/services indicated on the invoice will be returned to the respective department to address.

### 4. Contract Routing Process:

Email all contracts to [Purchasing@essex.edu](mailto:Purchasing@essex.edu)

#### Examples of Contracts include:

- ✦ MOU and MOA
- ✦ Leases/Rental Agreements
- ✦ Clinical Agreement
- ✦ Faculty Contract Addendum
- ✦ Agreements to Service
- ✦ Consultant Agreement
- ✦ Software License Agreements (Subscriptions)
- ✦ Nondisclosure Agreements
- ✦ Waivers and Releases
- ✦ Any other document that binds the College

## 5. Request for Toner:

**The College has two approved vendors for toners, a Purchase Requisition (PR) must be entered in Banner (i.e. Tree House and Allied Documents).**

- ✦ Include the manufacturer number and toner color in the PR description. This information is found on the current toner cartridge. For example, HP 25x Black Yield Toner Cartridge, Manufacturer number #CF325x.

## 6. Request for Charter Bus:

**Departments in need of shuttle services for airport or conference transportation, student field trips, campus tours, athletic tournaments, or other group travel will need to utilize the charter companies on Essex County College's approved vendors' list.**

- ✦ The requesting department must complete the Charter Bus Request Form.
- ✦ Enter a Purchase Requisition (PR) in Banner

## 7. Hiring Consultants:

**To protect the institution, all vendors or consultants doing business with, or on behalf of, the College must enter into an agreement with us, before conducting any business. The "Agreement for Consulting Services" MUST be completed and submitted to the Purchasing Department. The following documents are needed:**

- ✦ Completed "Agreement for Consulting Services" (signed by the consultant).
- ✦ Current resume for the consultant or company profile
- ✦ Completed and signed W9 or W8
- ✦ Invoice (if appropriate)
- ✦ Completed consultant, Honorarium and Service Form (ECC 460)
- ✦ Purchase Requisition (PR) entered in Banner

## 8. FREQUENTLY ASKED QUESTIONS

1.

**I received an invoice from a vendor from the prior fiscal year. The purchase order number listed on the vendor invoice expired. How can the vendor receive payment?**

**Answer:** Create a new purchase requisition in Banner. In the comment field, input the expired purchase order number indicated on the vendor invoice.

2.

**Are there forms that are required for vendors?**

**Answer:** Yes, purchasing will request those documents from the vendors. To expedite the processing time, we recommend that the department provide vendors with the Purchasing Vendor Forms which are located at <https://www.essex.edu/finance-forms>

Vendors need a New Jersey Business Registration Certificate (NJBRC) for goods and services over **\$6,240**. Vendors that are registered as 501 (C)(3) are exempt from NJBRC.

- The Political disclosure forms are needed for purchases over **\$17,500**.

A W9 is needed for all vendors along with the vendor information form.

### 9. Unauthorized Purchase:

**An unauthorized purchase of goods or services occurs when a Purchase Order is not in place before goods/services are received. This is a violation of College Reg 3-5. (N.J.A.C 5:30-5.2)**

- ✪ A corrective action form (Unauthorized Purchase Form) will be required by all departments found to violate the procurement process to indicate our universal commitment for continual improvement.

## 10. Contract Legal Review Checklist

All contracts are deemed ready for legal review once they have cleared purchasing and are complete (i.e. consist of the contract, all documents referenced in the contract and any addendum). **Legal review does not replace procurement requirements, purchase requisitions or Board Approval.**

Initiating Department at ECC: \_\_\_\_\_ Date: \_\_\_\_\_

Vendor's Name: \_\_\_\_\_

Individual Responsible for Contract: \_\_\_\_\_

**To expedite legal review of all contracts, please address the following guide with your vendor:**

- Terms/Conditions:** If any terms/conditions are referenced by a link, ask the vendor for a PDF of the document.
- Governing Law:** The contract must state it is governed by New Jersey law (**See N.J.S.A. 59:13-4**).
- Contract Period:** The contract has a clear beginning date and states the duration of the contract (i.e., 24 months).
- Auto-renew:** Any reference to the automatic renewal clause must be removed by the vendor.
- Payment Terms:** The contract clearly states payment amounts and when payment is due.
- Pre-payment:** Ask the vendor to remove any pre-payment or advance payment requirements.
- Attorney's fees:** Ask the vendor to remove all statements that the College will pay attorney fees or costs.
- Data Privacy:** If the contract involves the use of a student's educational record, a student's personal identifying information or non-directory student data, then a FERPA statement must be included.<sup>1</sup>
- Indemnification:** This clause must be removed, limited or mutual (i.e., each party agrees to indemnify the other).
- Insurance:** If the contract requires insurance from ECC, you must confirm ECC's coverage with Purchasing.
- Signature Authority:** The President is the only authorized person to sign.

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<sup>1</sup> **FERPA STATEMENT:** "To the extent this Agreement involves or maintains educational records related to a student of Essex County College, (NAME OF VENDOR) agrees to comply with the Family Educational Rights and Privacy Act (FERPA), to the same extent as such laws and regulations apply to the College and shall limit access to only those employees or agents with a need to know. For the purposes of this Agreement, pursuant to FERPA, the College hereby designates (NAME OF VENDOR) as a school official with a legitimate educational interest in the educational records of student(s) to the extent that access to the College's records is required by (NAME OF VENDOR) to perform this Agreement."