



# Newark Board of Education

Sherelle Spriggs, Director of Support Services  
Division of Purchasing

Where Passion Meets Progress

## PLEASE READ THE ENTIRE INSTRUCTION SHEET BEFORE ENTERING ORDERS

PLEASE REFER TO THE DISTRICT WEBSITE UNDER PURCHASING'S "NEW SCHOOL YEAR ORDERING 2020-2021" TAB  
<http://www.nps.k12.nj.us/departments/purchasing/new-school-year-ordering/>

Welcome to the 2020-2021 School Year!

The Purchasing Department desires to provide optimal service to meet the needs of our school community. The ordering details for the most common goods and services are provided in the "NEW SCHOOL YEAR ORDERING" tab, located on the District website. This information should help you navigate through PeopleSoft's eProcurement system and maximize efficient processing. Please take a moment to familiarize yourself with the information. Share these forms and related information with your staff.

## NEW JERSEY REGULATORY REQUIREMENTS

### CODE OF ETHICS

In every action, employees must be guided by New Jersey and the Newark Board of Education code of ethics. It is an extremely important component in procurement. District policy File Code: 4119.21/4219.21 CONFLICT OF INTEREST; provides a detailed outline of the acceptable postures. All District policies are located on the District's website. Please refer to same. The following points warrant highlighting:

- A Board of Education employee shall not have any interest, financial or otherwise, direct or indirect, or engage in any business or transaction or professional activity which is in conflict with the proper discharge of his/her duties.
- A district employee shall not use or attempt to use his/her position to secure unwarranted privileges or advantages for himself/herself or others.
- A district employee shall not act in his/her official capacity in any matter wherein he/she has a direct or indirect personal financial interest such as selection or purchase of any textbook or other materials on which he/she receives a royalty.
- A district employee shall not accept any gift, favor, service or other thing of value under circumstances from which it might be reasonably inferred that such gift, service or other thing of value was given or offered for the purpose of influencing him/her in the discharge of his/her duties. Any gift shall not exceed the IRS gift regulatory standards.
- Bribery and corrupt practices by employees as described in the criminal justice code are forbidden and will result in disciplinary action including termination and shall be prosecuted to the full extent of the law.
- School officials may not accept offers of meals, entertainment, or hospitality, which is limited to clients, and/or customers of the individual providing such hospitality. School officials, if attending a conference, convention or workshop, may attend hospitality suites or receptions provided such hospitality suites or receptions are open to all persons attending the conference, convention or workshop, in accordance with School Ethics Commission Policy Guideline No. 1.

District employees, who provide services as vendors, at their own assigned physical location, present a conflict of interest, expose the District to unnecessary additional liability and question the District's ability

to safeguard against undue influence. Consequently, it is against District policy for an employee to simultaneously act as a vendor for the District.

### **UNAUTHORIZED PURCHASES**

Any employee of the Newark Board of Education who orders and/or receives any materials, supplies or services before receiving an **approved Purchase Order** has made an unauthorized purchase.

Unauthorized purchases are a violation of New Jersey State Law

- ✓ N.J.S.A. 18A:18A-1 et. seq.
- ✓ New Jersey Quality Single Accountability Continuum Fiscal Management Indicator
- ✓ N.J.A.C. 6A:23A-5.4(a) Violation – Without State Aid (penalty)

The State of New Jersey conducts regular audits of the District’s business practices. **Failure to comply with State regulations and District policy with respect to contracting with vendors puts the District at risk for penalties, and may in certain instances result in district employees assuming responsibility for the costs incurred.**

Employees, who do not follow the proper purchase order process, may be subject to the following penalties:

First Offense	Mandatory Training	Pay for Purchase
Second Offense	Letter in Personnel File	Pay for Purchase
Third Offense	Disciplinary Action	Pay for Purchase

The goal is not to penalize employees, but the District must comply with proper purchasing procedures. All District employees must comply with this mandate.

**VENDORS** - The District will send vendors notification of unauthorized services/goods. Such notification will explain the process for securing an authorized purchase order. It will also advise vendors that any future violations will result in a forfeit of payment. Vendors that repeatedly violate this process will be referred to our Legal Department for review.

### **QUOTES:**

Goods and services valued at:

- \$1 - \$5,999 - requires one (1) written quote (Local Funds)
- \$1 - \$2,999 - requires one (1) written quote (Federal Funds)
- \$6,000 - \$39,999 - requires two (2) written quotes (Local Funds)
- \$3,000 - \$39,999 - requires two (2) written quotes (Federal Funds)
- = or > \$40,000 - may require a formal solicitation, contact the Purchasing Department

A written quote must accompany your requisition. When soliciting quotes, the request for quote form should be used and sent to multiple vendors. Please utilize the vendor reference file and Purchasing contact sheet for assistance.

### **PEOPLESOFT e-PROCUREMENT SYSTEM**

All District funded purchases are processed through PeopleSoft Financials e-Procurement, the electronic procurement system. When purchasing contracted items that have a PeopleSoft item number as listed in the New School Year Ordering Folder, you should order items through “Express Item Entry”.

## EXPRESS ITEM ENTRY

The screenshot displays the Newark Public Schools eProcurement system interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and 'eProcurement > Requisition'. The user is logged in as 'Newark Public Schools' and has options for 'Home', 'Worklist', and 'Sign out'. Below the navigation bar, there is a 'Create Requisition' section with a 'Welcome Purchasing' message and a 'Checkout' button. A search bar is present with 'Request Options' and 'Search' buttons. The main content area is titled 'Express Item Entry' and features a table with columns for 'Item ID', 'Description', 'Quantity', 'UOM', 'Category', 'Price', and 'Merchandise Amount'. The table has one row with '1' in the 'Item ID' column and 'USD' in the 'Merchandise Amount' column. There is an 'Add to Cart' button below the table. A sidebar on the left lists 'All Request Options' and various categories like 'Catalog', 'DIVISION', 'SERVICES', 'USE', and 'DEPARTMENTS'.

- **Steps:**

- eProcurement
- Requisition
- Express Item Entry
- Enter the item number in the “Item ID” field and quantity in the “Quantity” field, the other fields will auto populate
- Click the “+” sign to add items
- Click “Add to Cart”
- Click “Checkout”
- Name your requisition (top right corner)
- Enter the appropriate GAAP account code number “Mass Change”
- Add your “JUSTIFICATION”
- Click on “Budget Check”
- Click on “Save and Submit”

## WEB BASED / PUNCH-OUT ORDERS:

- All Pearson/Prentice Hall items should be ordered through the punch-out.
- All Schools and Central Office may order general classroom supplies and office supplies from W.B. Mason, School Specialty, Lakeshore, and Kaplan.

## SPECIAL REQUEST:

- Only use the “Special Request” tab to order **ITEMS NOT LISTED** in the New School Year Ordering 2020-2021 files or available on punch-out.
- Lines descriptions must include the product item numbers and complete description; including colors, sizes, editions, etc.
- Remember to attach supporting documentation in the form of a quote as this is required for approval and processing to purchase order. Online print screens are NOT valid as a quote for processing to purchase order, a formal quote is required.

## SELECTING VENDOR NUMBERS

Be careful when selecting vendors. If more than one vendor number or address exists, please ensure you are selecting the correct shipping address for the order.

- **DO NOT SELECT VENDOR NUMBERS THAT READ “PUNCH-OUT”.**

- **DO NOT USE DOT.COM'S THAT DO NOT ACCEPT PURCHASE ORDERS**

## **NEW VENDOR INFORMATION**

- Do not put vendor information in the comments field.
- If the vendor is new, use the "Suggested Supplier" field and provide complete information.
  - Full name, complete location address, email address
  - Note required documents as listed under "Consultants"
- The 'New Vendor Set-up' informational form and 'IRS Request for Taxpayer Identification Number and Certification: W-9' must be completed before the requisition can be processed to a purchase order. Purchasing will request this documentation directly from the vendor. Note: processing may be delayed until information is received.
- Optional: You can always request the vendor set-up form from Purchasing by emailing [Purchasing@NPS.K12.NJ.US](mailto:Purchasing@NPS.K12.NJ.US) . You may send them to the vendor for completion and attach to your requisition, this will aid in expediting the delivery of goods/services.

## **CATEGORY CODES and ACCOUNT CODES**

- Make sure to use the correct category and account code. You can search for category codes by clicking on the magnifying glass when creating the requisition, then on the new page that opens select Description from the drop down menu and perform a search using key words e.g. catering, or incentives.
- Only use the codes that appear.
  - This will ensure your order is routed to the appropriate Analyst. Requisitions containing improper category codes will be denied.

## **JUSTIFICATION FIELD**

- Use the "justification" field to communicate to approvers only.
- Select the appropriate reason from the list of categories or enter a unique justification.

## **INCOMPLETE DESCRIPTIONS AND ITEM NUMBERS**

- Please proofread your requisitions, the requisition should mirror the quote.
- Ensure item numbers and complete descriptions are included. Both are needed. In the item description field, enter the item number first followed by the description.
- Additional item information should be placed in the comments field.
- Do not enter multiple items on the same line or in the comments field. Each item must be entered on a separate line (itemized).

## **SHIPPING COST**

You must reserve 10% of your account for shipping charges. The cost of the service will be paid from the 10% reserve.

## **PURCHASING GOOD AND SERVICES**

### **ADMISSION TICKETS FOR FIELD TRIPS AND EMPLOYEE TRAVEL**

- Field trips are submitted electronically.
- Employee travel is submitted electronically.

### **CATERING**

All districts are governed by Administrative Code N.J.A.C. 6A:23A-7.12 on allowable expenditures for meals and refreshments. The section addresses procurement of allowable items.

- All requisitions must include the following information:
  - Purpose, date of event, number of people, cost per person and LIST OF DISTRICT STAFF IN ATTENDANCE. CATERING CAN ONLY BE PROVIDED FOR STAFF DURING THE PARENT-TEACHER CONFERENCE PER THE NTU CONTRACT.
  - Unit price maximums are as follows:

Breakfast	\$ 3.75
Lunch	\$ 7.00
Dinner	\$10.00
- Description examples:
  - NOT ACCEPTABLE:
    - “Qty 1, unit price \$200. For Parent/teacher conference May 1.”
  - ACCEPTABLE:
    - “Qty. 30 Unit Price \$6.00 Description: For community engagement event for 8<sup>th</sup> grade parents dinner, Friday, April 2, Menu: Salad, potatoes, sandwiches, soft beverages. 2 teachers will be in attendance: Mr. Smith and Ms. West.”

### **CELLULAR TELEPHONES & EQUIPMENT**

The Newark Board of Education will provide cellular telephones to select groups of employees or personnel whose affiliation with the District requires this form of communication to perform their functions. The related policy and procedures are located in the “New School Year Ordering” tab on the District’s website. The type of phone and plans available are limited. Choices must be limited to the options indicated.

- Any new phone/service orders will require written authorization and secured funding, from the school/department, prior to ordering.

### **CONSULTANTS**

- Use the ‘CONSULTANT’ form to order professional services. Do not use Special Request for consultants.
- Enter complete details. “Consultant for 2020 – 2021” is not considered a complete description. **MAKE SURE YOUR DESCRIPTIONS AND/OR SCOPES OF WORK ARE COMPREHENSIVE AND INCLUSIVE. ALL VITAL FACTS ABOUT THE SERVICES REQUESTED MUST BE INCLUDED.**
- **A COMPLETE PROPOSALS THAT INCLUDES A DETAILED SCOPE OF WORK AND DAILY RATE ARE REQUIRED.**
- If the vendor is new, use the “Suggested Vendor” field and provide complete information.
  - Full name, complete address, email address
- The ‘New Vendor Set-up’ and ‘IRS Request for Taxpayer Identification Number and Certification: W-9’ forms must be completed before the requisition can be processed to a purchase order. Purchasing will request directly from the vendor.

- The request for quote form must be utilized when soliciting quotes for consulting services. Quotes should be sent to at least three vendors, utilize the Purchasing contact sheet if assistance is needed identifying additional vendors.

## COPIERS

- Copier inventory for the service and maintenance program requires continual updating as new equipment is purchased, and older models become obsolete. It is imperative that **ALL** copiers are identified; service options will be determined.
- THE MAINTENANCE INVENTORY WORKSHEET IS DUE TO ELAINA RENEE MARTINEZ **BY JUNE 5, 2020.**
  - Please download the worksheet from the District's website.
- Note that due to cost, machines more than 7 years old are no longer included in the program. Any repairs will be based on time & labor; cost will be charged to the requestors budget. The machines included on the Districts' Service & Maintenance Inventory for your location are available upon request, please email Elaina Renee Martinez.
- Today's technology advances rapidly, new machines include fax, scanning, and network capabilities. Administrators are encouraged to replace older machines or expand usage on newer models at their locations. Contact Elaina Renee Martinez for assistance.

### COPIER LEASE PAYMENTS

The annual lease payments for all copiers were appropriated to the accounts during the Budgeting Process.

**The Purchasing department will create a Purchase Order for each lease agreement by July 2020.**

Funds will automatically be drawn from your budgeted accounts. If additional funds are needed notification will be sent.

- **Lack of appropriate funding may cause the suspension of services and supplies District wide.**
- **Any print charges in excess of the contractual allowances (overages) will be the responsibility of the individual location.**

## CURRICULUM

The Office of Curriculum has released guidance on purchasing instructional materials for the coming school year. For curricula adopted centrally, the Office of Curriculum will continue to purchase student consumables and materials for new students. Schools may opt to purchase supplemental materials.

- Schools requesting instructional materials **NOT** approved through the Office of Curriculum and **NOT** listed on the curriculum google site **must seek approval from the applicable department.**
- Documented approval must be attached to the requisition. Documentation can be in the form of a scanned or saved email.

<https://sites.google.com/a/nps.k12.nj.us/curricula/home>

## HEALTH SUPPLIES

Health supplies are to be ordered through the District's approved Health Supplies contract. All items will ship directly from the vendor, the warehouse no longer stocks supplies. The item number **MUST** be utilized. If your location desires health items outside of the contracted lists, approval from the Office of Health Services is required.

- Category code 4200 must be used for Health Services to approve.
- All health supplies require the approval of the Director of Health Services Dr. Marguerite Leuze.

## **INSTRUCTIONAL TECHNOLOGY**

The Information Services Department is actively working to provide a list of updated hardware. Once finalized you can review from the District website <http://www.nps.k12.nj.us/departments/information-services/>

- All requisitions requesting technology not on the Information Services List must use category code 4321 for approval.
- All software license requisitions must use category code 4321CS for approval.

## **PETTY CASH**

- Disbursements cannot exceed \$700 for elementary and \$1200 for high school **ANNUALLY**.

## **PREQUALIFIED VENDORS**

- The index of prequalified vendors can be found the District website in the 'New School Year 2020-2021' ordering tab.
- The index contains a summary of the type of services offered, vendor name, and contract number.
- A proposal for the services recommended at your location must be attached. Services must be itemized with accompanying cost clearly delineated.
- Note: Pre-Qualification Solicitations are done periodically. An updated listing will be distributed through an announcement in Principal Points and or posted online.

## **SCHOOL PLANNERS**

- Supporting documentation in the form of a quote must be attached to the requisitions for approval and processing to purchase order.
- Some vendors require a signed agreement before processing the order. All agreements requiring a signature must route to legal for review. The only authorizes signatories for the district are the Board Chair or School Business Administrator.
  - Note, some terms may affect the District's ability to use certain vendors.

## **WATER**

- **A REQUISITION MUST BE SUBMITTED FOR WATER DELIVERY AT YOUR LOCATION.**
- Each location will be assigned a separate purchase order for water supplies. It is incumbent on the users to monitor their consumption and guarantee sufficient funding.
- Delivery will be terminated once funds are exhausted.
- Receipts must be entered after each delivery.
- Refer to the water file for requisition instructions.

## **RESOURCES**

There are several procurement resources available; the links are listed below for your convenience.

- PeopleSoft e\*Procurement Training
  - This session will include an overview of best practices in Procurement. Statutory and District policies will be discussed. Attendees will receive hands on PeopleSoft e\*Procurement training. The new electronic field trip process will be introduced.
    - <http://www.nps.k12.nj.us/departments/purchasing/eprocurement-training-registration-form/>
- FAQ

- Frequently Asked Questions will provide general knowledge of most common aspects of procurement

<http://www.nps.k12.nj.us/departments/purchasing/>

- NBOE Policy Manual

[http://policy.microscribepub.com/cgi-](http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=1908723966&depth=2&infobase=newark.nfo&softpage=PL_frame)

[bin/om\\_isapi.dll?clientID=1908723966&depth=2&infobase=newark.nfo&softpage=PL\\_frame](http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=1908723966&depth=2&infobase=newark.nfo&softpage=PL_frame)

**It is important that you follow the directions for submitting school orders to ensure accurate processing. If you have any questions, please contact a Purchasing Team Member.**



# Division of Purchasing

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**Fax 973-733-6600**

<b>Staff</b>	<b>Commodities</b>	<b>Email</b>	<b>Ext</b>
Erica King	<b>PeopleSoft Assistance</b> , Employee Supplier ID, General Purchasing assistance, Travel, Field Trips	<a href="mailto:e3king@nps.k12.nj.us">e3king@nps.k12.nj.us</a>	6549
Susan Balbosa	Food Services, Catering, Software, Security, Science, and Music Instruments	<a href="mailto:sbalbosa@nps.k12.nj.us">sbalbosa@nps.k12.nj.us</a>	6553
Tracey Robinson	Instructional Materials, School/ Office Supplies, Athletics, Health Supplies, Hardware, Furniture, Diplomas, Trophies, T-Shirts, Forms, Business Cards	<a href="mailto:t6robinson@nps.k12.nj.us">t6robinson@nps.k12.nj.us</a>	7675
Ma'Lorie Lott	<b>PeopleSoft Assistance</b> , Catering, Field Trips, Travel, Unauthorized Purchases, Petty Cash, Water, School Supplies	<a href="mailto:mlott@nps.k12.nj.us">mlott@nps.k12.nj.us</a>	7704
Chantal Scott	School Supplies, Contract Administration, Cell Phones	<a href="mailto:c3scott@nps.k12.nj.us">c3scott@nps.k12.nj.us</a>	6212
Nathaniel Harp	Warehouse Services, Motor Pool	<a href="mailto:nharp@nps.k12.nj.us">nharp@nps.k12.nj.us</a>	8055
<b>Print Services</b> Yahsameen Bush	Reproduction and Graphic Design	<a href="mailto:printservices@nps.k12.nj.us">printservices@nps.k12.nj.us</a>	973-938-7503
<b>Mail Services</b> Nicholas Pietropaolo	Mail Room, Supply Store, Central Office Multi-Purpose Paper		973-938-7338
<b>Facilities Purchasing</b> Nicole Yarbough Ledah Arbubaker	Building Supplies, Building Repairs, Air Conditioners, Signage, Banners,	<a href="mailto:nyarbough@nps.k12.nj.us">nyarbough@nps.k12.nj.us</a> <a href="mailto:larbubaker@nps.k12.nj.us">larbubaker@nps.k12.nj.us</a>	

**Note: When calling for assistance have either your requisition number or purchase order number ready.**