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# Quick Reference Guide for Procuring Goods and Services

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## Procurement Card (P-Card)

- Splitting orders to avoid exceeding thresholds is not permitted.
- P-Card is not to be used for travel, meals and entertainment purposes.
- Single Transaction: \$500.00
- Monthly Spend Limit: \$3,000.00

## Requesting a Card

- Contact the Manager, Budgeting and Accounts Payable for an application form.
- Forward completed application to the Manager, Budgeting and Accounts Payable.
- Allow up to two weeks for delivery of the card.
- You will be contacted for an orientation session once the card is available.

## Local Field Orders

- Contact Procurement Services to request Local Field Orders.
  - Give the White copy to the supplier and obtain the receipt from the supplier.
  - Send the Yellow copy with the receipt (and invoice if provided) to Accounts Payable.
  - Retain the Pink copy for your files.

## Purchase Requisitions and Purchase Orders (POs)

- Splitting orders to avoid exceeding thresholds is not permitted.
- Requisitions are submitted electronically through Colleague.
- If you require an account, please see the Colleague tab in the Financial Services website: <https://financial-services.acadiu.ca/colleague.html>.
- Competitive quotes are required for purchases between \$10,000 and the Tender threshold.
- Forward quotes and any supporting information to [procurement@acadiu.ca](mailto:procurement@acadiu.ca).
- Requisitions must be approved by the budget officer or individual with spend authority. The initiator is responsible for securing the proper approvals by entering the approver when creating the requisition. Requisitions submitted with missing or incorrect approvers will not be processed. See below for the approval limits.
- Procurement Services will create the PO and send copies to you and the vendor.
- Return your signed copy to Accounts Payable when goods/services are received in good condition.
- Contact [procurement@acadiu.ca](mailto:procurement@acadiu.ca) for expediting or if there are problems with the delivery.
- Rush orders must be handled through Procurement Services. Do not place orders directly with a vendor.

### Operational Purchases

- Requisition approval levels for most\* Operating Accounts:

<b>Requisition Approval levels for Operating Accounts</b>	
Administrative Staff (not all)	Up to \$2,000
Managers / Department Heads / Directors	\$2,000+ to \$5,000
Executive Directors / Deans / Vice Provost	\$5,000+ to \$10,000
Vice Presidents	\$10,000+ to \$25,000
VP Finance and Administration & CFO (or when unavailable: Associate VP Finance and Treasurer)	\$25,000 to \$1,000,000
Associate VP Finance and Treasurer AND VP Finance & Administration & CFO	\$1,000,000+

\*Limits for Physical Plant may differ from the levels posted above.

- Faculty Start-up Funds are approved by the Dean of the respective Faculty.
- 25.55 Funds are approved by the Head or Director of the respective Department or School.
- For Special Reserves, please confirm with the respective Budget Officer.

### Grant Purchases

- Faculty Grant requisitions are typically approved by the grant-holder.

### **Procurement Thresholds and Tenders**

- Contact Procurement Services for requirements with an estimated value of:
  - \$25,000+ for Goods
  - \$50,00+ for Services
  - \$100,000+ for Construction

For more information, visit the Procurement Services website or contact Procurement Services at [procurement@acadiu.ca](mailto:procurement@acadiu.ca).