



Requester Guide

THE SIMPLE RULE: Obtain the appropriate approval and purchasing document **before** committing Jacksonville University funds or asking a vendor to begin work.

Why is all this work necessary?

JU is frequently audited and reviewed by different groups. Within the last few years, JU's financial processes were determined to lack the appropriate structure and oversight required to comply with generally accepted accounting principles and accreditation standards. This has resulted in JU's structured procurement process, essential for maintaining strong financial control.

The process ensures purchases are properly authorized, funds are available, competitive pricing is considered, and contractual and financial risks are reviewed before the University commits resources. The process also creates a clear audit trail, prevents duplicate or unauthorized spending, and supports accurate budgeting, accounting, and timely vendor payment. Ultimately, it protects Jacksonville University's resources while promoting accountability, transparency, and responsible stewardship.

What is a purchase?

A purchase is any commitment of university funds in exchange for goods or services. It includes more than ordering a physical item. A purchase may be a one-time transaction, a recurring charge, a service engagement, a subscription, a registration, a rental, or another arrangement that creates a financial obligation for JU.

Common purchases	A purchase can happen when you...
Supplies, equipment, software, subscriptions, consulting, repairs, catering, rentals, memberships, and event services	Place an order, sign or accept terms, click "agree," authorize work, schedule a service, use a university account, or otherwise tell a vendor to proceed

Before contacting or committing to a vendor

- Define the business need, estimated total cost, funding source, and required date.
- Confirm whether an existing JU contract or approved purchasing method applies.
- Consider the full commitment—not only the first invoice—including renewals, shipping, implementation, maintenance, and other fees.
- Allow time for quotes, competitive sourcing, vendor setup, contract review, approvals, and purchase order issuance when applicable.
- Do not sign vendor documents or accept online terms unless you have delegated authority to do so.

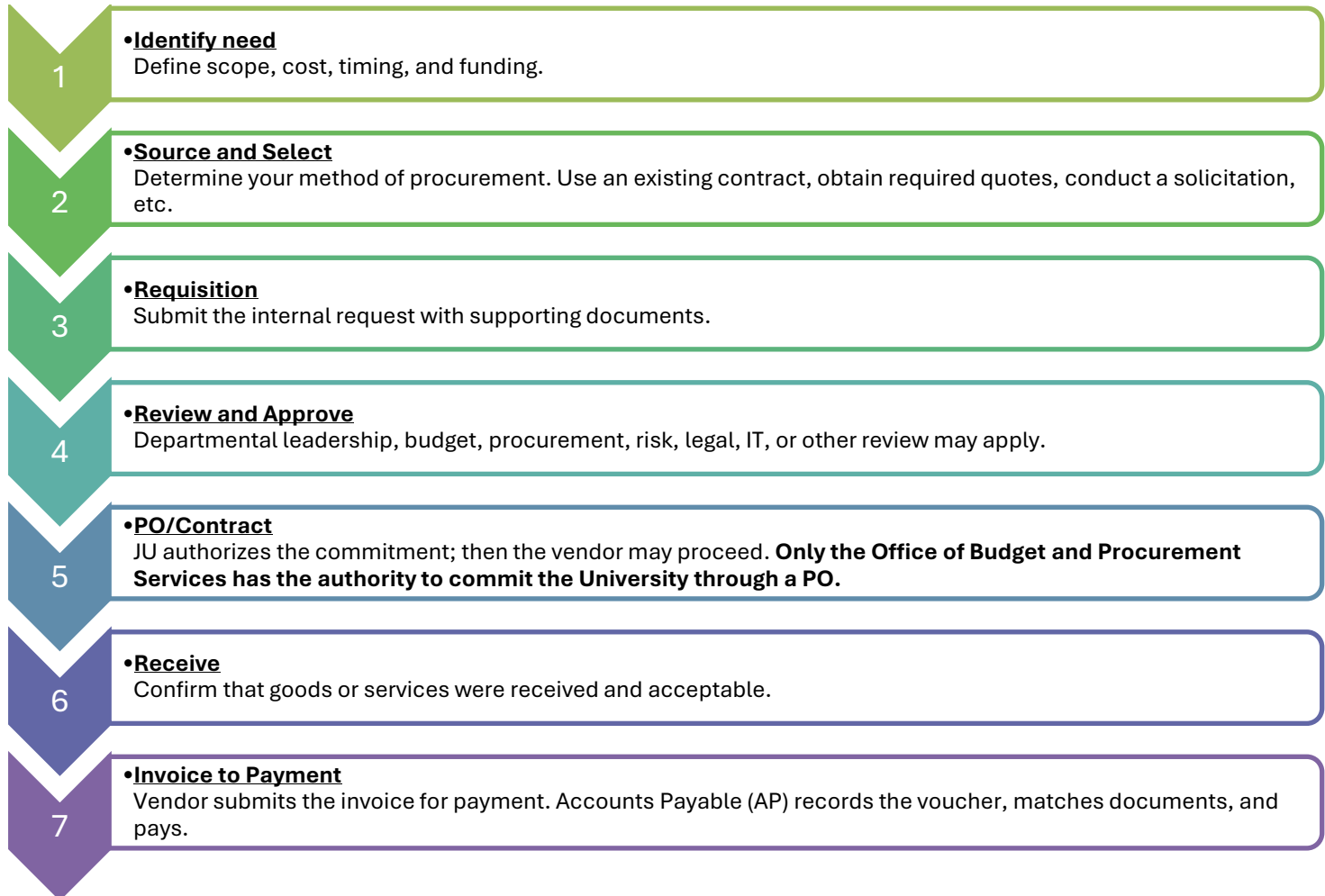
REMEMBER!

An available approved budget only means funds are available; it does not authorize a purchase.



The Procure-to-Pay flow

Procure-to-pay (P2P) is the complete process from identifying a need through paying the vendor and closing the transaction.



Who is the requester?

A requester is an employee of JU, faculty or staff, that has a need to make a purchase using University funds. Departments may choose to designate one or more requesters or may have each area responsible for their own purchases, at their discretion.

What are the requester's responsibilities?

- Determining the need is a legitimate business need and funds are available
- Develop accurate specifications or scope of work, estimate the total anticipated cost, and critical dates
- Obtain required quotes, vendor information, proposals, contract documents, and other supporting documentation
- Coordinate legal review and CFO execution of multi-year contracts



- Complete and submit a requisition, for multi-year contracts a requisition will be submitted covering each fiscal year
- Provide timely responses during the requisition review and ensure there has been no vendor commitment made a PO is issued or contract executed
- Once goods are received or services are rendered, complete the receipt within 5 days
- Ensure prompt communication about shortages, damage, disputes, or changes
- Serve as the liaison between the vendor and the University
- Ensure vendor submits timely invoices, especially at the end of the fiscal year

WHY THE ORDER MATTERS: Approvals and purchasing documents protect JU, reserve budget, communicate authorized terms, and support critical and legally required internal financial controls.



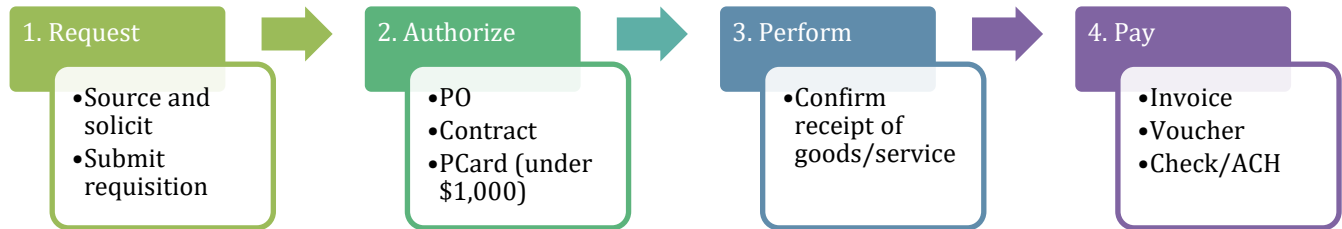
Key purchasing terminology

Use these definitions to understand what each record does—and what it does not do.

Term	Definition	Important distinction
Requisition	An internal request for approval of a proposed purchase, including the need, vendor, timing, expected cost, and funding.	Not a PO; do not send it to a vendor as authorization.
Purchase order (PO)	JU's formal purchasing document issued after a requisition is fully approved, identifying the authorized goods or services, amount, terms, and PO number. A PO is considered a less formal version of a contract.	PO numbers should be referenced by the vendor on all invoices. POs also result in encumbrances within Colleague.
Contract	A binding agreement between two (2) or more parties, which defines the agreement term, financial obligations, rights and responsibilities, scope of work, etc. All JU contracts must have a termination clause unless an exception is granted.	A contract and PO serve different purposes; some purchases need both.
Encumbrance	Funds set aside in Colleague, JU's financial system, which records an approved purchase commitment, upon issuance of a PO is issued. It is relieved when the purchase is fully paid, canceled, or closed.	An encumbrance reduces the available budget but is not an expense or payment.
Receipt	The requester's confirmation that goods were delivered or services completed as agreed upon in the scope of work, in whole or in part.	Completed within Colleague before payment can be issued.
Invoice	The vendor's request for payment showing what was provided, the amount due, and payment details.	Does not replace a requisition, PO, contract, or receipt.
Voucher	JU's internal AP record created from an invoice, recording the liability, accounting, vendor, amount, and payment status. The voucher results in a check or ACH payment to the vendor.	Once a voucher is entered, payment is made on the next biweekly check run.



How the Parts Connect



Not every purchase uses every document, but the applicable path must be determined before JU is committed. Budget & Procurement Services can help identify the correct route.

Tips and Tricks

Practical guidance for moving a purchase through the process successfully

5 tips to prevent delays

1. **Start early:** Remember, the procurement process happens **BEFORE** any work begins or product is received. **Expect 7 business days** for a requisition to be fully approved and a PO issued. For large purchases, engage Budget & Procurement Services early in the process before negotiating final terms or promising a start date.
2. **Submit the full picture:** To properly determine the correct method of procurement that will result in the best value for the University, finalize your business purpose, what problem you are trying to solve, and a complete scope/specifications, and your estimated total cost and sufficient funding. For completed contracts, we should know delivery or implementation dates, vendor details, and supporting documents.
3. **Wait for authorization:** Do not allow the vendor to start, ship, or invoice until the required PO and contract are in place.
4. **Receive promptly:** After satisfactory delivery or performance, enter the receipt so AP can process the invoice timely.
5. **Flag changes:** Contact Procurement before changing scope, price, term, vendor, or quantity; a PO change or contract amendment may be required.

Common situations

Situation	What to do
"The vendor needs a signature."	Route it for authorized review and signature. Do not sign unless JU has formally delegated that authority to you. Authorized Signatories: • VP of Budget & Procurement Services: Vendor Terms and Conditions, Order Forms, Event Contracts, or other agreements limited to one year • CFO (after Legal approval): Multiyear contracts, and anything not specified above.



Situation	What to do
“The invoice already arrived.”	Follow the established after-the-fact process. Do not alter dates or create a misleading receipt.
“This is a renewal.”	Treat it as a new commitment. Review price, term, cancellation date, performance, funding, and approvals before renewal.
“The cost changed.”	Pause before authorizing additional work and request the appropriate PO change or contract amendment before exceeding the authorized amount.
“The goods are here.”	Inspect them, document issues, and receive only the accepted quantity that meet the scope/specifications. Never receive or pay for goods or services not actually accepted.
NEED HELP? Contact Jacksonville University Budget & Procurement Services before committing funds when the correct process, required documents, or approval path is unclear. JU policies, procedures, delegated authority, and the facts of the purchase govern when requirements differ.	

Frequently Asked Questions (FAQs)

Help with common questions

Five tips to prevent delays

- 1. What happens if my requisition is denied?**
Review the comments on the requisition in Self Service for the reason of the decline.
- 2. How can I check on the status of my requisition?**
Within Self Service, under Financial Management>Procurement, you can view the status of all requisitions you’ve submitted and POs that have been issued with you as the initiator.
- 3. What happens once my requisition is fully approved?**
JU Procurement Services must complete and issue the PO in Colleague. Once complete, the PO will be emailed to you and the vendor (if an email address is provided). If Procurement Services does not have an email address for the vendor, it is the requester’s responsibility to ensure that the vendor receives the PO.
- 4. Where can I find a list of current University Term and cooperative contracts?**
You can view available contracts on the JU Procurement Services website, and as Exhibit B to this guide.
- 5. I can’t find my vendor in Self Service, what do I do?**
The vendor will need to be registered in Colleague. Have the vendor complete the Supplier Information Form and provide a copy of their IRS Form W9. Send the form and W9 to controlr@ju.edu.
- 6. What do I do if I need to change my PO after it was issued?**
Complete the Change/Close PO Request Form available on the JU Procurement Services website, MyJU, and linked [here](#).
- 7. When should I use my PCard?**
Purchases less than \$1,000 (except High-Liability purchases), can be made and paid with the requester’s PCard without a requisition. Before making the purchase, the user will need written approval from their supervisor, via email. The approval should be uploaded along with the receipt within Emburse.