June 19, 2018

Dear colleagues.

Last week, we informed business managers across the university about the availability of new and updated documents and forms. These and other changes are being made following the recently approved Procurement and Payment Policy 20.1.11, and the July 1, 2018 effective date for Uniform Guidance, the rules and regulations that govern the administration of federally funded grants. The University Procurement Services Procedures Manual and accompanying work instructions are posted on our website.

Today, we would like to provide you with details regarding the most notable changes. This information and additional resources are available on the University Procurement Services Recent Initiatives webpage.

**Procurement Forms for Purchases $10,000+**

Effective July 1, 2018, forms are mandatory for all requisitions for purchases $10,000 and greater.

- The forms are not required for purchases made using a University contract.
- Each form includes questions that must be completed to ensure compliance with University policy and, where applicable, Uniform Guidance.
- You can access the forms via the Forms Repository.

<table>
<thead>
<tr>
<th>If you have this type of purchase...</th>
<th>then you should use this form, and...</th>
<th>watch this tutorial.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitive purchases $10,000 - $149,999</td>
<td>Informal Bid Intake Form</td>
<td>Instructions Instructional Video</td>
</tr>
<tr>
<td>Competitive purchases $150,000+</td>
<td>Formal Bid Intake Form (updates the RFX Intake Form)</td>
<td>Instructions Instructional Video</td>
</tr>
<tr>
<td>Non-competitive purchases $10,000+</td>
<td>Waiver of Bid Request Form (replaces the Sole Source Form)</td>
<td>Instructions Instructional Video</td>
</tr>
</tbody>
</table>

- Purchases under $10,000 do not require one of the above-referenced forms. Units should review the How to Buy guidelines to ensure compliance.

**Professional and Business Service Engagements**

- The Professional and Business Services Matrix has been updated.

- The Professional Service Provider Agreement (PSPA) is no longer available for use. Existing PSPAs will be honored through their end dates, and new PSPAs will be accepted through June 30, 2018 only.
The preferred and quickest method of contracting service engagements is via a purchase order (PO), which incorporates the University’s procurement terms and conditions, along with a Statement of Work (SOW). Unit and supplier signatures are not required if a PO with an SOW is used to contract a service provider.

Check Request Matrix
The check request matrix was updated in May 2018. Key revisions are listed below. Complete check request instructions are posted on Canvas.

- Clarification of the appropriate account codes to use.
- Removal of performers and guest lecturer/speakers. These service engagements must be processed as POs, not check requests.

Throughout the summer and fall, we will host events on campus to further brief units on these important changes.

We appreciate your cooperation!

If you have any questions, please contact the University Procurement Services help desk at procure@finance.rutgers.edu or (848) 932-4375.

Thank you.

Nimish Patel
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University Procurement Services