

APPENDIX B - PROCUREMENT QUICK REFERENCE GUIDE

	Existing TCU (MSA's) or TCU Cooperative Contract (Cooperative Purchasing) (Preferred)	P-Card	Price Quote	Informal Solicitation	Formal Solicitation	Sole Source or Sponsored Research Exemption
\$ Amount of Purchase	Any \$ Amount	\$1-\$2,500	\$1-\$49,999	\$50,000-\$249,999	\$250,000 or over	\$250,000 or over
Department's Responsibility	Purchase from TCU's Jaggaer punchout catalog or MSA suppliers Note: If available, adopt outside consortium, government, higher education or cooperative contract (Cooperative Purchasing)	Consult P-Card guidelines for permitted purchases and provide receipt substantiating the purchase	Submit Jaggaer requisition and attach one written price quote to requisition	Submit Jaggaer requisition and attach multiple (at least two) written price quotes and evaluation form to requisition Note: Sponsored research or grant funded purchases, provide as stated above or provide a Sole Source or Sponsored Research Exemption Form	Contact Procurement to discuss and provide Procurement with specs for requested goods or services Note: After award, submit Jaggaer requisition and document solicitation and contract number to requisition	Complete Sole Source or Sponsored Research justification Form
Procurement's Responsibility	Provide support as needed Note: If available, adopt outside consortium, government, higher education or cooperative contract (Cooperative Purchasing)	Provide support as needed	Provide support as needed	Provide support as needed	Review specifications, issue formal solicitation, facilitate the solicitation process and negotiate until award	Review sole source and/or sponsored research justification form. Note: If Procurement does not approve Sole Source or Sponsored Research Exemption, department shall abide by Procurement's standard guidelines stated herein

PROCUREMENT EXEMPTIONS

Advertisements	Accounting, tax, auditing, physician and legal Services	Affiliation agreements with hospitals or other health care providers for student clinical education programs	Artistic services (Original artwork & artifacts)
Athletic competition (Goods and Services tied to Athletics regular and post-season competition)	Catering and meals (Do not include University wide food service providers)	Conference or registration fees and related expenses	Direct publications (Subscriptions, newspapers, books, films, tapes or videos)
Executive and athletic air charters	Exhibit spaces	Freight or shipping charges	Goods or services mandated by TCU's governing collegiate sports affiliates (NCAA or Athletic conference)
Health and/or disability services provided for immediate care of students and employees	Hotels, lodging and conference rooms for guests, students and employees	Lecturers, entertainers, and guest speakers	Live animals and animal feed
Membership or certification fees and dues	Postal services	Purchases from governmental agencies, State Agencies/Body and other institutions of Higher Education	Purchases of goods and services directed or approved in writing by TCU's Board of Trustees, Chancellor, President and/or Grantor(s) of grants or sponsored research awards
Purchase of medical or travel insurance for students	Purchase of employee benefit or retirement plans	Recruitment services for students	Resale purchases (Used equipment or supplies)
Travel (all travel operating policies and procedures must be followed and all travel must be booked in Concur)	Training or education services to students and employees	Utilities, cable and other government franchised services	Emergency purchase of goods or services. When the delay of Procurement guidelines or processes would result in a condition which threatens the health, safety of persons or animals, the preservation of property and/or a vital University function

NON-PROCUREMENT/PAYMENT REQUEST

Article Publication Fees	Bank Fees	Bond Payments	Cash Awards (non-staff)
Cell phone	Conference Registration	Game Guarantees	Guest Fellowships (non-student)
Guest/Non-employee travel/expense reimbursements	Honorarium	Incentive/Research Participant Payments	Interest Payments
License Fees & Permits	Medical Services	Membership/Professional License	Postage
Audit, Legal and Tax Firm Fees	Real Estate and Property Fees	Refunds	Royalties
Sign-on Bonuses	Sponsorship and Contributions	Sports and Event Security Fees	Utilities
Visa Applications Fees			

