

Purchase Request: Roles and Responsibilities Matrix

Activities required to process the purchase of goods and services (over \$5,000)

Process Name	Department Responsibility	SCE Responsibility	Central Office Responsibility
<p>Purchase Request</p> <ul style="list-style-type: none"> ✓ For purchase of goods greater than \$5,000. ✓ For purchase of services greater than \$5,000. 	<ul style="list-style-type: none"> • Identify details of goods/ services requested • Identify name of recommended vendor(s) and obtain quotes, if applicable • Determine availability of funds/ purchase is appropriate for source of funds • Consult SCE on requirements, as needed • Complete Purchase Request form & DAQ form if required <ul style="list-style-type: none"> • Facilities Services: Provide Purchase Request form with AiM shop work order & phase information/ identify chartfield string • Submit Purchase Request form via SMS, include all required documentation • Receive and deliver product • Provide SCE with signed receipt/BOL document 	<ul style="list-style-type: none"> • Consult with department on purchase requirements. as needed • Confirm details of goods/ services with customer and determine type of purchase (bid, sole-source, brand specific, etc.) • Determine whether DAQ form is to be completed by customer • Facilitate customer consultation with Central Office for “high-complexity” purchases • Request add/ verify vendor in ConnectCarolina • Create purchase requisition in ConnectCarolina • Validate availability of funds/ purchase is appropriate for source of funds • Re-work denials/ exceptions/ approve • Submit PO to Central Office • Track request to issuance of PO <ul style="list-style-type: none"> • Facilities Services: Enter information in departmental subsystem • Close service request • Received goods/services in ConnectCarolina 	<ul style="list-style-type: none"> • Work with SCE & customer to complete “high-complexity” purchases • Confirm type of purchase (bid, sole-source, brand specific, etc.) • Approve purchase in connect Carolina • Source purchase and issue PO • Manage invoice receipt and payment to vendor, handle dispute resolution • Ensure compliance with purchasing regulations • Maintain files/ records