**PURCHASE ORDER / PURCHASING CARD APPROVAL STEPS**

1. Do I have appropriate documentation!
   1. PO Request Form
      1. Is a single item over 5K ie. Equipment and must use obj 1872. Obtain additional asset information.
      2. Is the PO over 10K
         1. if “contract” vendor, proceed
            1. in supplier list, see if there is a Y in contracts column
         2. if not a “contract” vendor, request BID WAVIER
            1. as the requester and/or the faculty attached to them

(Can I assume that these items are unique and the vendor is a Sole Sourced vendor?) Email Template: Because the Carl Zeiss PO is over 10K we will need a Bid Wavier. Can you please explain why you need to use this company for this service?

* 1. Purchasing Card (form or email)
  2. PI or Delegate are the only authorized approvers/signatures on either form/email

1. Do the items on the form match the Requisition?
2. Was the appropriate OBJ Code used? See list below.
3. For long term services, these should be entered as the larger number as the quantity over the cost. This way you do not run into holds over the duration of the service
4. Approve requisition and Save documentation to appropriate folder
5. Naming convention (include ALL FUNDS and ORGS when 000000 or CREFs when 01400X)

Office Supplies (5220) cannot be placed on grants

Research Supplies can be placed on Discretionary and/or grants

5228 – External Laboratory Supplies – Laboratory/Research supplies purchased from outside vendors for use in laboratories (glassware, solvents, chemical)

5236 – Hazardous (Leave Alone)

5220

5225 ~~5 fund grant~~ / okay on a discretionary fund

5291

~~5249 – RARELY EXCEPTABLE~~

1872 – Any single item over 5k

* Is this item:
  + Centrifuge
  + Refrigerator
  + Microscope
* What room will this item be located?

5211 – Catering (BIG events)

5209 – Local Meals /Travel

5331 – Maintenance + Services

5319 – Services by Individual

5339 – Services by Company LLC

Ex - Curtis Bay

5223 – Computer Software, Accessories and Supplies

5224 – Truly a Computer (Desktop or Laptop)

5264 – Publication

5270 – Shipping

5232 – Animals Supplies (check for approved IACUC, otherwise reclassify to 5228)

Ex. Midwest Veterinary (always animal supplies)

5241- Human Supplies (should never be on a PO, reclassify to 5228)

5225 – Furniture (discretionary (startup / department) or reclassify to 5228