

Purchasing Procedures

The University has lots of purchasing rules. This document is only to highlight the basics and is not fully inclusive of all regulations. If you have questions, please see Julie in room 101 or Beverly in 130.

- Ensure that you are not charged sales tax. The UK tax exempt number for Kentucky Sales Tax is A-276. Some vendors will require a certificate. The most recent tax exempt certificate can be found here: <http://www.uky.edu/Purchasing/docs/taxexempt.pdf> Just fill in the vendor name.
- Tax exempt certificates and information for other states can be found here: <http://www.uky.edu/Purchasing/docs/statestaxexempt.pdf>
- Procard purchases:
 - Please use the new Procard form effective 10/01/2016: <https://www.uky.edu/bae/sites/www.uky.edu.bae/files/BAE-procard-voucher.pdf>
 - Purchaser, Supervisor and Cardholder must sign the form.
 - Electronic signatures are allowed
 - If purchaser is also the cardholder, only the purchaser space needs to be signed.
 - Purchasers may submit vouchers without supervisor signature. The business office can route forms for supervisor signatures after edits are made.
 - Procard charges over \$500 require written pre-authorization by the purchaser's supervisor. The pre-authorization can be by email and attached to the voucher.
 - Completing Procard Vouchers:
 - Staple itemized receipt to back of Procard Voucher.
 - Items Purchased and Business Purpose sections:
 - Completion of these fields is required by UK.
 - Provide a brief description of the items purchased.
 - The business purpose needs to be more than just "research." For grant audit purposes, we need to be able to support **how the purchase benefits the project.**
 - Examples:
Items -glucose calibration solution and standard
Purpose-to quantify glucose in fermentation samples
Items -mesh screen blanks
Purpose-screen is used in the water retention value test
Item- Bugs of the Underworld DVD
Purpose-Lecture in BAE 532/CE 542Intro to Stream Restoration
 - Provide account number, project name, course number or something to help the business office determine the appropriate account number.
 - If Julie has given you an internal order number (8090000XXXXX), please enter it in the Internal Order field.
 - Place completed forms in the tray/box outside of 130-Beverly's office.
- Each transaction is a separate edit in SAP. In general, we need receipts on separate vouchers.
 - Exception: If you return something or get a tax refund, you must submit the receipt with a Procard Voucher just like a purchase. Provide as much information as possible about the original charge so that we may match the credit correctly. A charge and return are two transactions and both must be edited. If you make the return or get a tax refund before submitting the original paper work, then all receipts can be attached to one voucher. Please list the amounts on separate lines.
 - Do not add transactions from different vendors to the same voucher.
- Do not use the Procard for fuel unless you are driving a rental car on university travel.
 - Fill up university vehicles at the Motor Pool
 - Use the Voyager card outside Lexington.

- Do not use the Procard at restaurants. The exception is the UK Faculty Club- the Procard can be used to pay for candidate interview meals.
- Food items and supplies for certain approved events may be purchased by Procard at Kroger.
- The single transaction Procard limit is \$5,000. For orders over \$5,000 (including single pieces of equipment \$5,000 or more) email written vendor quotes to julie.tolliver@uky.edu and a purchase order will be issued. Do not split the order on multiple Procard charges to avoid this rule.
- Dell, MoreDirect, CDW-G, Office Max, Grainger, Life Technologies, Steelcase, VWR, and Fisher are now part of the Supplier Resource Management (SRM) “punch out catalog” system. **In general, the Procard is no longer allowed at any of these vendors.**
 - All orders from the catalog system require the account number at order creation.
 - Office Max is the contract vendor for office supplies. Please see Jayne for ordering.
 - Dell, MoreDirect, and CDW-G are the primary contracts for computers, peripherals and accessories. Please see Doug for ordering.
 - VWR holds the primary lab supply and equipment price contract. Please see Jeff or Julie for ordering.
 - Fisher Scientific holds the secondary contract-their SRM catalog contains only items that are exclusive to Fisher and not available through VWR. Please see Jeff or Julie for ordering.
 - Exception: The Procard may be used at the Grainger store if you need to be able to see items in person.
- Under no circumstances may a charge post to a grant without an itemized receipt.
- Do not sign written agreements with vendors. Only a Purchasing representative has the authority to review and sign a written vendor agreement. Failure to obtain proper review can leave the signatory at personal liability. The existence of a vendor agreement usually requires the SAP requisition process. Examples of this type of agreement include equipment rentals and exhibit space agreements. Please provide Julie with a copy or scan of the agreement. It will be sent to Purchasing for approval and further instructions. You cannot proceed until the document has been returned.
- Avoid buying supplies out of pocket. If you do require personal reimbursement, complete a Personal Reimbursement form: <https://www.uky.edu/bae/sites/www.uky.edu.bae/files/BAE%20personal%20reimbursement.pdf>
 - Include a reason that the appropriate payment method wasn’t used. A vendor refusing to exempt a Procard purchase from sales tax is not a reason to pay with personal funds. Avoiding using approved vendors is also not a reason.
- Promotional and UK logo items must be bought on purchase orders from approved vendors. This applies to anything printed with a UK logo-pencils, T-shirts, table covers, etc. Please email a written quote to Julie. Information on promotional items and a list of approved vendors can be found here: <http://www.uky.edu/Purchasing/promoitems.htm>