

Chemical & Materials Engineering Purchasing Procedures

Quick Reference Guide

| | Procard | Purchase Order | PRD | Notes |
|---|---------|----------------|-----|-----------------------------------|
| Airfare for business-related trips | X | | | Avant, AAA or Concur |
| Awards up to \$50 | | | X | Check with us for policy details |
| Books, reference | X | X | | |
| Computer Accessories | | X | | CDW-G, More Direct, Dell or Apple |
| Computer Hardware | | X | | Dell or Apple |
| Chemicals – VWR, Fisher, LifeTech, Grainger | | X | | |
| Chemicals – other vendors | X | X | | |
| Equipment over \$5K | | X | | |
| Equipment under \$5K | X | X | | |

Quick Reference Guide

| | Procard | Purchase Order | PRD | Notes |
|--|---------|----------------|-----|-----------------------|
| Equipment repairs / service | X | X | | |
| Freight and other shipping | X | X | | |
| Lab Supplies – VWR, Fisher, LifeTech, Grainger | | X | | |
| Lab Supplies – other vendors | X | X | | |
| Office Supplies | | X | | OfficeMax Only |
| Promotional Items (including T-shirts) | | X | | Approved Vendors Only |
| Registration Fees, conferences | X | | | |
| Software | X | X | | |

Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

- * *Tip: Check the VWR website for lab supplies and chemicals -- even if you always used to get them from Fisher, Sigma, etc. The VWR contract includes negotiated pricing as well as a 2% rebate to departments for all orders placed with them using this system.*
- * *Shipping is FREE from VWR and items are delivered the next business day in most cases.*

Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

- * VWR offers price-matching. If the product you want appears to be priced lower from another vendor, give VWR the chance to price match. It doesn't take much time; just call or email Jill and she'll reply quickly.
- * VWR Sales Representative:
Jill Ducker 859-321-7764
Jill_shunk@vwr.com
- * Fisher Sales Representative:
Megann Tate 859-433-7569
megann.tate@thermofisher.com

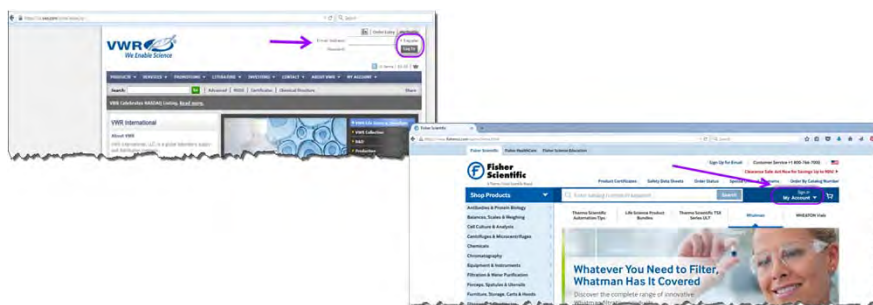
Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

Many vendors sell through our VWR portal as well so please check VWR first! For example:

- Abaxis, Inc.
- Ace Glass
- Agilent Technologies
- Alfa Aesar
- BDH
- Biolegend
- Chemglass
- EMD Millipore
- Enzo Life Sciences
- GE Healthcare
- Hamilton
- Labconco
- Mettler-Toledo
- Polysciences
- TCI America
- Ultra Scientific

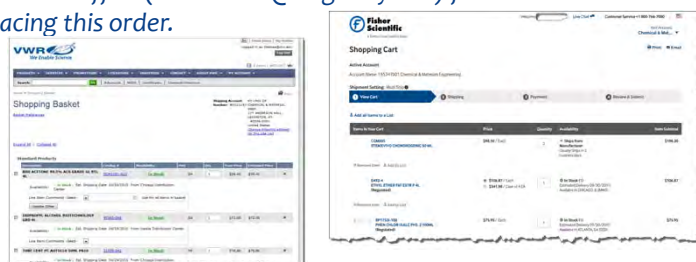
Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

* **Step One:** Log in to the vendor's website



Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

* **Step Two:** Search for your items and build a shopping cart. If an item you want appears as "restricted" or you are unsuccessful in adding it to your shopping cart, contact the CME Business office (cmeorders@engr.uky.edu) for assistance with placing this order.



Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

- * **Step Three: Print your shopping cart.** Click <File> <Print> and choose “Adobe PDF” if you have it. If creating a PDF is not possible for you, a screenshot will also work just fine as long as the item numbers and descriptions are legible.



Ordering Lab Supplies from VWR, Fisher, Life Technologies, or Grainger

- * **Step Four: Send the PDF of the shopping cart to your supervisor for approval.** Ask your supervisor to reply with “approved” and to provide the 10-digit account number for the project or cost center they’d like charged.
- * **Step Five: Send your request to cmeorders@engr.uky.edu.** Send an email with your supervisor’s approval, the account number and your PDF to us at cmeorders@engr.uky.edu. We will place your order for you and email you the confirmation.
- * **Step Six: Double check the confirmation.** Look over the confirmation to make sure we ordered everything accurately and note the expected delivery date(s).
- * **Step Seven: Turn in the Packing Slip!** Believe it or not, this is the most critical step for us on the business side. The vendor will not be paid until and unless we “confirm” receipt of your items so we will need the packing slip. If, for some reason, no packing slip arrives, please be sure and send us an email letting us know which exact items and quantities you’ve received.

Using the ProCard

- * No order may be placed without first obtaining a control number.
- * The procurement card's **single item** limit and total transaction limit is \$5000.
- * **DO NOT split purchases to circumvent this limit.**

Using the Procard: Restricted Purchases

- * Alcoholic Beverages
- * ATMs/Banking Services/
Cash Advances
- * Communication Services
(cellular phones, pagers,
internet services, etc.)
- * Consulting and Related
Service
- * Flowers
- * Insurance
- * **Meals/Restaurants**
- * **Memberships**
- * Medical Services
- * Prescription Drugs and
Controlled Substances
- * Promotional Items
- * Temporary Help Services
- * Weapons/Ammunition
- * All Other Discretionary
Expenses

Using the Procard: Funding & Approval

- * **Approval:** The advisor's approval is required. If he/she cannot sign in person or digitally, an email approval from the advisor is acceptable.
- * **Cost Center / WBS #:** The funding source is required. To avoid mistakes, please get the number from your advisor rather than just the name or sponsor acronym of the grant.
- * **Control #:** Your control number will be issued by the CME Business Office. Please DO NOT place your order until you receive the control number.

Ship to and billing address:
UNIVERSITY OF KENTUCKY
Chemical and Materials Engineering
177 F. Paul Anderson Tower
512 Administration Drive
Lexington, KY 40506-0046
Phone: 859-257-5823
Fax: 859-323-1929

APPROVAL: *Chelsea*
Digitally signed by Chelsea Manning
DN: cn=Chelsea Manning, o=University of
Kentucky, ou=Chemical & Materials
Engineering, email=cmeng@uky.edu,
serial=
Date: 2015.10.28.08:43:22-0400

(Advisor signature REQUIRED)

Cost Center/WBS # 3048101234
(REQUIRED)

***Control #:** _____
(MUST BE OBTAINED BEFORE PLACING ORDER)

Using the Procard: Procard Order Approval

Approval may either be the professor's signature on the Order Worksheet or an email from the professor indicating it is OK to purchase.

Please get the actual account number (not an abbreviation of the grant name) for the order worksheet.

Using the Procard: Obtain a Control Number

Email cmeorders@engr.uky.edu with your completed and **signed** order worksheet

The control number enables us to identify multiple purchases on department cards and match up the order worksheets with receipts, packing slips, and other documents later in the process so it's important that you *ask the vendor to reference this number*.

Using the Procard: Control Number

When you request a control number, someone will verify that your account is valid, has the available funds and budgeted categories are in place prior to ordering. We also make sure that the purchase is permissible on the ProCard.

Using the Procard: Placing the Order

1. **PLEASE USE YOUR OWN NAME.**
2. Tell the vendor you are making a purchase using a credit card and that you have an internal PO# (this is the CME control number).
3. UK is always tax-exempt (A-276).
4. Give the Procard Number and Expiration Date.

Using the Procard: Placing the Order

5. Billing address is:
177 F Paul Anderson Tower
Lexington, KY 40506-0046.
5. Shipping address is:
512 Administration Drive
177 F Paul Anderson Tower
Lexington, KY 40506-0046.

Using the Procard: Placing the Order

7. Verify the total charges, including any shipping/handling, hazardous fee charges, etc.
8. Ask for order confirmation #; then request that the order confirmation be emailed to you as well.

NOTE: By University policy, vendors are not permitted to charge for purchases until the items have been shipped.

Using the Procard: Documentation

- * Forward any electronic documentation, such as an order confirmation, to cmeorders@engr.uky.edu.
- * Place any paperwork you haven't emailed in the top metal basket on the packages table in the main office (177 FPAT).

Using the Procard: Documentation

Examples of acceptable supporting documentation includes, but are not limited to:

- * Original sales receipt
- * Original packing slip
- * Original cash register itemized receipt
- * Copy of work order form
- * Email confirmation of Internet order
- * Invoices

Using the Procard: Documentation

Documentation must support the transaction and contain the following information:

- * Vendor name
- * Detail listing of what was purchased, including item description, quantity and price
- * Total dollar amount of the purchase
- * Transaction date
- * Purpose/explanation for purchase

Purchase Orders

Which acquisitions require a Purchase Order?

- * Items which cost \$5000 or more
- * Computers and computer accessories
- * Office Supplies & Promotional Items

Steps to take to have a Purchase Order issued:

- * Request an official quote from your vendor.
- * Forward the quote and the advisor approval to cmeorders@engr.uky.edu along with the 10-digit account number.
- * Submit the packing slip when your item(s) arrive.

Receiving the Order

- * Before taking a package from the main office, please be sure to sign it out on the YELLOW part of the packages log.

| Date Received | Shipped by | Vendor | Addressed to | Date Picked Up | Picked up by (name) | Phone # |
|---------------|------------|-------------------------|--------------|----------------|---------------------|--------------|
| 01/03/2016 | UPS | VWR | Dr. John Doe | 01/04/2016 | Jane Doe | 555-1212 |
| 1/25 | Amazon | VWR (14) | PAGE | 1/26 | Ann | 271-324 |
| 1/26 | UPS | Memphis (2) | Nick | 1/26/17 | Nick | |
| 1/26 | UPS | VWR (2) | Nancy | 1/26/17 | Mullen | 7-527 |
| 1/26 | UPS | VWR (2) | Ann | 1/26 | Ann | 671-710 |
| 1/26 | UPS | Fisher | Mills | | | |
| 1/26 | UPS | Acros | DeFroe | | | |
| 1/26 | FedEx | Creative Resources Corp | Comp | 1/26 | Ann | 514-111-5925 |
| 1/27 | UPS | Whaleys.com | Nancy | 1/27 | Mullen | 7527 |

Receiving the Order

- * If your package contains chemicals, do not take it until there is a chemical inventory tag/confirmation sheet attached.
- * If your order requires refrigeration, be on the lookout for delivery. It is **your** responsibility to receive it in a timely manner.
- * Check your shipment to be sure all items were received in good condition.
- * Sign and date every packing slip related to your order and place them all in the basket in the main office (177 FPAT).

Receiving the Order

| THEME FISH SCIENTIFIC CHEMICALS, INC. | | Packing Slip | | PAGE : 1 | |
|---|-----------------|---|-----------|---------------------|--|
| 1777 Main Shipponer H 7520097886 I 512 Administration Dr F Lexington, KY 405060046 T TEL: 8 800-932-5000 G | | FEDERAL/STATE/LOCAL DUNS: 61-279-9478 FEDERAL/STATE/LOCAL: 23-2543453 | | C/DATE 59010724 STM | |
| Div of Kentucky | | SHIPPER NO. OF PKGS | | ORDER WEIGHT | |
| 1777 Main Shipponer | | DATE SHIPPED | | SHIPPING CHARGES | |
| H 7520097886 | | SHIPPER NO. OF PKGS | | ORDER WEIGHT | |
| I 512 Administration Dr | | DATE SHIPPED | | SHIPPING CHARGES | |
| F Lexington, KY 405060046 | | SHIPPER NO. OF PKGS | | ORDER WEIGHT | |
| T TEL: 8 800-932-5000 | | DATE SHIPPED | | SHIPPING CHARGES | |
| G | | SHIPPER NO. OF PKGS | | ORDER WEIGHT | |
| 4356640462 | | DATE ENTERED (ALFA ABBAS ORDER NUMBER) | | FOA PLANT | |
| 3/17/17 | | 61953708 | | Mard Hill | |
| 1/17/17 15:56:03 | | | | | |
| NET 30 DAYS /330 | | UPS | | SHIP VIA | |
| STOCK NUMBER | UNIT OF MEASURE | SHIP QTY | ORDER QTY | ORDER QTY | SHIPPING DATA DESCRIPTION |
| 40769-36 SB-09-06 | 250g MESH Y | 1 | 1 | 1 | Crabapple powder, synthetic, 20-100 mesh, 99.9% (metals basis) |
| 10190-09 SB-11-05 | 10g MESH Y | 1 | 1 | 1 | Germanium powder, -100 mesh, 99.999% (metals basis) |
| SI6C008 | | 1 | | | |
| *** Shipping Instructions *** | | | | | |
| *****VUS***** | | | | | |
| FOR SAUCE/IMP/PEAKERS USE UPS FREIGHT | | | | | |
| UNLESS IONE A OVER IL/ | | | | | |
| *** BALANCE OF ORDER TO FOLLOW *** | | | | | |

Purchasing Summary

- * Stay within UK guidelines on types of items, costs and method of procurement.
- * Always get a control number **BEFORE** ordering with a Procard and ask the vendor to reference that control number on the order.
- * When paying by Procard, don't forget to provide the vendor with the card number & expiration date at the time the order is placed.
- * Get all invoices and packing slips to cmeorders / the main office as soon as possible.
- * Be certain to check for your deliveries frequently but don't take away chemicals until they've been inventoried.