Purchasing Flow in BAE

July 2021

Rationale

1. UK is moving towards more SRM ordering – that means a staff member places the order
2. With Concur there is much more scrutiny of procard purchases
3. Need to use SRM vendors or other vendors with price contracts first (listed on purchasing’s website, requires log in with linkblue top right of page) <https://purchasing.uky.edu/>
4. Department has issues with chemical inventory, building infrastructure required for equipment, equipment inventory and other issues
5. We have limited staff, to expedite purchases we are developing a common order form
6. There will be multiple levels of approvals for most items
7. Reduces chances of errors and paperwork to correct. Once an item is entered into SRM it is very difficult to change. When something is entered it has to be correct.

**This process is focused on SRM ordering and chemical, lab supplies, and biological items on a procard. It will also take time, the goal is to have things returned/ordered within three business days.**

Basically 3 methods of purchasing most things in BAE

1. SRM Vendor Purchase Orders – Typically it is VWR, Fisher, Grainger, Office Depot, Dell, Apple, CDW-G, MoreDirect, AWG, Herman Miller, and Steelcase in BAE. No procard allowed. Do not use Amazon to avoid these vendors. Price is not a reason to use another vendor without written approval from Purchasing. We need an order form to streamline these purchases.
2. Procard for non SRM vendors - McMaster Carr, Lowes, Sigma, etc. Remember cardholder supervisor preapproval over $500. Our concern in this category are chemicals, lab supplies and biological items, this requires order form.
3. Purchase order – non-SRM vendors over $5,000 or vendors that don’t accept Procard. Quote required, vendor has to be entered into UK system and agree to UK terms.

SRM and non SRM Purchase order steps

1. Purchaser – Tolliver, Moore, Kesner
2. Approver – Montross, Tolliver
3. Confirmer – Moore, Kesner

Order approval form

Order approval form is required for: any SRM vendor, all orders of lab supplies, chemicals, biological materials, and all office and computing supplies. PI signs order form and provides account number. Routing depends on item ordered:

* 1. SRM vendors, that are not lab items, send to bae.business@uky.edu for ordering. This is most likely Office Depot, MoreDirect, CDW-G, or Grainger. Form will be returned to PI with PO number. PI confirms order was received in good working order by forwarding approved order form (with PO number) and a scanned copy of the packing slip for confirmation to bae.business@uky.edu.
	2. Lab chemicals/supplies/biological items send to Kesner
		1. If SRM order, form returned with PO number. Kesner performs confirmation and performs chemical inventory.
		2. If an alternate vendor has been approved to be used with procard, Kesner approves, returns signed order form via email and PI orders with their procard (if over $500, send to cardholder supervisor for preapproval). PI then completes procard voucher, attaches signed order form, and submits to bae.business@uky.edu. Kesner will update chemical inventory on arrival.
	3. Compressed gases (AWG) send to Fogle, he will order and return confirmation of order. Fogle or Kesner will update chemical inventory.
	4. Computer orders go through Carr. Feel free to ask questions on peripherals. Carr will obtain quotes for computers, tablets, iPads. PI submits form for peripherals (this is option 1 above), likely CDW-G, Office Depot, or MoreDirect directly to bae.business@uky.edu
	5. Equipment requiring building utilities (electrical, water, DI, drains, etc) send to Fogle. This could include SRM vendors (Grainger or VWR) or non-SRM vendors. If VWR or Fisher, send to Kesner. Grainger send to bae.business@uky.edu. Watch $500 cardholder supervisor preapproval for procards.

No/limited impact on engineering supplies/electronic supplies/shop supplies and non-chemical/biological items on a procard. PI will continue to purchase, create voucher, scan invoice and submit to bae.business@uky.edu as 1 pdf file. Cardholder supervisor preapproval is required by email for procard purchases over $500. The pre-approval email must be obtained prior to purchase and must be attached to the voucher.

Possible additional approvals

1. Department money requested – Montross or Tolliver (delegate)
	1. If department money request, is it related you your Hatch/multistate, yes or no. PI signs if yes.
		1. If not related to Hatch/multistate, we will find appropriate account.
	2. If approved, request is forwarded to appropriate person. Will get a not approved email otherwise.
2. Cardholder supervisor preapproval is required for procard purchases over $500 regardless of funding source – likely Montross or Tolliver. No > $500 preapproval required on SRM orders.
3. Requests for office supplies- send to bae.business@uky.edu, regardless of funding source. If you buy office supplies on your procard, you risk having the charge deducted from your paycheck.

Hints

1. Questions? Ask. It is easier to fix things before a purchase is made.
2. Do not split procard charges to avoid > $500 preapproval or to avoid using a purchase order over $5,000.
3. Personal reimbursement is discouraged and you risk not being reimbursed.
4. With PO over $5,000, non-contract vendors have to agree to UK terms. UK is not flexible on terms and have had to source items from other vendors. Contract vendors agree with all UK terms.
5. Remember, we cannot sign any agreements. Email bae.business@uky.edu for guidance.
6. Travel, meals, and other items are not covered in this document.
7. Dollar values include shipping. Also remember that 600 items at $1/each on a procard, is a $600 charge, and needs supervisor approval.
8. Make sure the order form/procard voucher remains editable by business staff in case the description needs to change or we need to move to a different account.
9. UK pricing from VWR: Create an account at VWR. Add delivery address and other information. Use **Shipping Account Number:** 80073692. This will give you UK prices, backorder status, and ability to pick alternates if items are backordered.

Examples

1. Jameson needs a lab chemical. He fills order form and sends to Shi. Shi signs and sends to Kesner. Possible routing is:
	1. If it is on Shi’s grant and from VWR, it will be ordered. Order form returned to Shi with PO number indicating it was ordered. Kesner will handle confirmation and coordinates adding to chemical inventory.
	2. If it is on Shi’s grant and from Sigma, Kesner approves. Then routing is
		1. If <$500, returned to PI for ordering. PI submits voucher, order form, and receipt to bae.business@uky.edu.
		2. If over $500 Kesner will forward to Montross for cardholder supervisor’s signature, then returned to PI for ordering. Kesner will coordinate chemical inventory. PI submits procard voucher, order form and receipt to bae.business@uky.edu.
	3. If department money, PI indicate if it is related to Hatch/Multi-state. Approval and account number can then be provided if approved.
2. Sama needs electronic supplies from Digikey. No order form required. Only need to check if purchase is over $500 or on department. Standard procard voucher procedure. If over $500, attach email showing supervisor preapproval.
3. Sama needs a flux capacitor. It is plugged into building. Route to Fogle to see if it can be connected in building.
	1. Flux capacitor is over $5,000 and available from VWR. Fill out order form, send to bae.business@uky.edu for ordering. Form is returned with PO number. When it arrives, scan shipping label to confirm receipt, send order form (with PO number) and packing slip to bae.business.
	2. Over $5,000 and from Triple ZZZ instruments. Need quote. Triple ZZZ will have to be added as a vendor and agree to UK terms. Then it is ordered. Send to bae.business. When it arrives, confirm receipt by emailing packing slip to bae.business.
4. Tim Smith orders steel for Colliver. Preference is Smith uses Colliver’s card. This way it is approved by Colliver through Concur. No order form, on procard and not a lab chemical/supply requiring inventory. Colliver’s grant is in engineering, he follows their rules, and additionally:
	1. Less than $500, no further approvals. Fill out procard voucher, attach receipt and include email approval from Colliver and submit to bae.business.
	2. If over $500, Montross is supervisor of both. If Smith purchases then need email from Colliver approving order and Montross as supervisor. Fill out procard voucher, attach receipt and email chain and submit to bae.business.
5. AWG is compressed gas vendor. Fill out order form and submit to Fogle. He will handle ordering.
6. Computer or tablet order? Work with Carr for quote.
7. Keyboard – use CDW-G, MoreDirect fill out order form and submit to bae.business. Likely paid by department, Tolliver approves by ordering. Consult Carr with questions.
8. Lab notebooks or other office supplies – go to Office Depot link on order form to see UK contract items, fill out order form and submit to bae.business, Tolliver approves by ordering.