

2009-2010 Senior Design Purchasing Procedures

On-Campus Purchases

When purchasing items on campus (UI Bookstore, UI Copy Center, Chemstores), all you need is a Budget Number and Activity Code. **Bring the receipt(s) to Molly ASAP do not hold on to your receipts.**

Facilities and Shop Stores Purchases

Please see Russ Porter in the ME Machine Shop for purchasing and work done by UI Facilities.

Credit Cards

Designated Purchaser

Each Senior Design team has a UI purchasing card. This will be the primary means of purchasing for your projects. One person per team will be designated as the primary contact for purchasing. Only the designated purchaser will be allowed to check out the credit card, and is responsible for turning in all paperwork and receipts in a very timely manner. Once a team has established who their designated purchaser will be, notify Molly and turn in the completed Designated User Agreement.

****No credit cards will be checked out for use until a completed credit card use agreement is turned in to Molly.**

Shipping

Items purchased over the phone, by fax, or on the internet must be shipped to the University, **not your home**, this is university policy. When available please list the amount for shipping.

Receipts and Invoices

A receipt, invoice, or order confirmation must accompany each order. (Exception: McMaster-Carr, they send an invoice by mail.) If you place an order by phone, ask the vendor how you will receive your invoice/receipt and make a note on your credit card order form. When orders are placed online, please print out the e-receipt and/or order confirmation, sign it, and turn it in with the rest of your paperwork. If a description of the item purchased is not on the receipt, please provide one when filling out the credit card order form.

****Packing slips are not an acceptable form of receipt.**

Tax Exempt

The University of Idaho is exempt from state sales tax. This is stated on the face of each credit card. Please do not forget. If a vendor needs our tax exempt information when placing phone or web orders, please contact Molly.

Restrictions

The following items are restricted and may not be purchased using a UI Credit Card:

Alcoholic Beverages/Controlled Substances
Ammunition/Weapons
Food/Water/Entertainment
Hospitality Expenses/Gifts (food/flowers/plants)
Household Moving Expenses
On-Campus Purchases (except UI Bookstore)

Office Decorations
Personal Items
Utilities/Cellular Phone Charges
Radioactive/Hazardous Materials
Consulting Fees/Individual Contractors

Each card has a credit limit of \$2500, for purchases over this amount please see Molly. Certain vendors or commodities have been "blocked" from usage. If you present your Card to any of these merchants, the transaction will be declined.

****Never make a purchase without checking the credit card out and never write down your credit card number to use at will****

Departmental Purchase Orders

For purchases of \$2500 or more and/or for vendors who do not accept credit cards, a departmental purchase order (DPO) will need to be requested. Please fill out a Purchase Request form and allow sufficient time for all required signatures to be collected.

Other Items

Vendors

MSC Industrial Direct – set up an online account or order by phone. If ordering by phone, ask to be put in the fax queue for invoicing. UI account number is 968108. <http://www.mscdirect.com> or 1-800-645-7270

The UI and ME have accounts with other companies please see Molly for details and questions.

Reimbursements:

For purchases paid for with personal funds, a reimbursement request form must be completed. A petty cash voucher will be issued for reimbursements of \$100 or less, and a claim voucher for amounts greater than \$100. Claim vouchers take 4-6 weeks from the time they are completed in the department to be processed.

- A detail receipt must accompany the credit card receipt.
- Each individual turns in his/her own receipts.

- Do not hold on to receipts, bring them to Molly ASAP.

DO NOT HOLD ON TO RECEIPTS!!

Please allow enough time to get the proper signatures and for forms to be processed, usually 2-3 days.

Receipts must be turned in for all purchases. If a description of the item purchased is not on the receipt, please provide one when filling out the reimbursement form. The forms are available outside the ME office (Engr/Physics 324K) in the wall file and on the ME website

If you have questions, please do not hesitate to stop by and see me. Office hours are from 7:30-4:30, Monday-Friday.

Molly's contact information:

Office – EP 324G

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