

Purchasing Procedures
Division of Undergraduate Studies

The Purchasing Process is as follows:

- Request to Purchase form completed, including vendor, date required, detailing items to be purchased, and price.
- Include quote if the items are not in SpearMart. Assign cart to UGS Fiscal Manager Jon DeStefano if the items are in SpearMart.
- Form sent to Fiscal Manager for approval, assigning budget numbers, and recommending method of purchasing.
- UGS Fiscal Manager will forward form to Purchasing Rep.
- Purchasing Rep will complete the purchase using the recommended method of purchasing.
- Most purchases will be delivered to the Purchasing Rep to receive items. If departmental personnel receive items directly in their office, they must ensure that they sign either packing slip or invoice and give to Purchasing Rep.
- Send any invoices you may receive to the Purchasing Rep, and they will receive items and/or fax invoice to Accounts Payable for payment.

Event / Food purchases must be approved by the UGS Fiscal Managers. If this method is used, please follow the guidelines below:

- Request to Purchase form completed, including vendor, detailing items to be purchased, purpose of purchase, price, date of event, and number of people in attendance. If there are 15 people or less in attendance, please provide the names of all attendees. If over 15 people, provide estimated number.
- Request quote (or some sort of item/price breakdown) from desired vendor, and ask about acceptable payment method. Please verify that they accept payments made over the phone, and what day/time would be best to call in the order for payment.
- Submit Request to Purchase and Quote from vendor to the UGS Fiscal Manager for approval.
- Purchasing Rep will complete payment on or before the event.

For Personal Reimbursement:

- Request to Purchase form completed and choose “reimbursement” as the request type.
- Be sure to include as much information on the form as possible including vendor, detailing items to be purchased, purpose of purchase, estimated price, date of event (if for an event), and number of people in attendance (if for an event).
- Save all receipts and submit to Fiscal Manager.
- These will be handled on a case by case basis and will not guarantee reimbursement until approved.