Standard Operating Procedure (SOP): Purchasing Processes

These are the procedures for procuring/purchasing items that are needed for classes, research, labs, etc, within BME. Please note that the only exception to this is for Student Organizations. Student Organizations need to work with BOSO to procure/purchase items and follow the policy that can be found here: https://www.purdue.edu/treasurer/finance/business-management/boso/

First point of contact for purchases/invoices: Crystal O'Neal, cdoneal@purdue.edu
If Crystal is away, please reach out to: Rhonda Jones, rwjones@purdue.edu

Walk-in/last-minute requests may not be accommodated depending on the situation. Please reach out if you have an urgent request, and we will try our best to assist!

Preferred Method: Ariba Ordering System

1. **Submit Purchase Request**
    - The requester sends an email to Crystal D. O'Neal at cdoneal@purdue.edu with:
        - Direct links to the items to be purchased
        - A brief explanation of the business need
2. **Order Placement**
    - Crystal will place the order through the Ariba system.
3. **Delivery Timeline**
    - Please note: Ariba orders may take **a few weeks** to arrive, and some items may not be approved by the University. If they are not approved by the University, additional time will be needed to work with Procurement regarding these items.
    - Plan ahead and submit requests early when possible.

A**lternative Method: Invoice Submission via TDX**

Use this method only if you receive an invoice from a vendor, the item that you are trying to procure cannot be procured through Ariba, or if the invoice is over the $1,000 single transaction limit.

Please note that when paying a vendor, it will take time for the vendor to receive payment, and that payment comes dependent upon how the vendor sets up their profile with Accounts Payable (in a system called Payment Works). If they are receiving a paper check, those are only cut once a month, and therefore, the vendor may not receive payment for a few weeks. If it's a direct payment, then they could receive the funds within 7-10 business days. If the vendor needs to be paid before the work is completed, or your request cannot wait for these time constraints, please work to see if the vendor will accept payment via a credit card, and this will need to follow the process for Department Credit Cards below. If a Department Credit Card is being used to cover these costs, you will need to work with Crystal in advance, as a credit card increase may need to be submitted and approved before paying the vendor. This can take 48-72 hours.

1. **Request Approval**
    - The requester sends an email to the Principal Investigator (PI), including:
        - Quote from vendor
        - The business justification
2. **PI Approval**
    - PI replies with:
        - Approval for the charge
        - The appropriate account number for the charge
3. **Forward Approval**
    - The requester forwards the PI's approval email to Crystal at cdoneal@purdue.edu
    - In the same email, provide the invoice.
4. **Submission for Payment**
    - Crystal will then submit the invoice to TDX for payment.

Alternative Method: Department Credit Card

Use this method only if items are needed within two weeks or cannot be purchased via Ariba.

1. **Request Approval**

- The requester sends an email to the Principal Investigator (PI), including:
    - A list of items to be purchased
    - The business justification for the purchase

2. **PI Approval**
    - PI replies with:
        - Approval for the purchase
        - The appropriate account number for the charge
3. **Forward Approval**
    - The requester forwards the PI's approval email to Crystal at cdoneal@purdue.edu
    - In the same email, request a time to check out the department credit card
4. **Card Checkout**
    - The requester meets with Crystal at the scheduled time to check out the card
5. **Make the Purchase**
    - The requester completes the purchase using the department card
6. **Return and Documentation**
    - The card must be returned to Crystal promptly (preferably within 24 hours unless arrangements have been made with Crystal to keep it longer)
    - Provide the receipt either:
        - As a physical paper receipt
        - Or by emailing a scanned/photocopy to Crystal
        - Please note that for receipts, the finalized receipt (including gratuity) is needed, along with an itemized receipt. Itemized receipts are always required for purchases.

Least Preferred Method: Personal Reimbursement

If none of the options above can be accommodated/completed, a personal reimbursement can take place. These steps are for transactions that you use your personal funds to cover. Please note that refunds are typically added to paychecks, so you will receive it added on top of your regular pay. If you do not see the refund within a month, please let Crystal know.

One item that **cannot** be reimbursed is alcohol, so if you are purchasing alcohol, please pay separately for it, as it cannot be on the receipt you are requesting reimbursement for.

1. **Request Approval**
    - The requester sends an email to the Principal Investigator (PI), including:
        - A list of items to be purchased
        - The business justification for the purchase
2. **PI Approval**
    - PI replies with:
        - Approval for the purchase
        - The appropriate account number for the charge
3. **Make the Purchase**
    - The requester then makes the purchase using their personal card.
4. **Return and Documentation**
    - To be reimbursed, Crystal needs:
        - Email from PI with approval and account number
        - A physical paper receipt or an emailed copy of the receipt
        - Please note that for receipts, the finalized receipt (including gratuity) is needed, along with an itemized receipt. Itemized receipts are always required for purchases.