Lab Admin Forum

Purchase Order Explanations
Review Process and Procedures
Best Practices

Let’s reduce everyone’s burden!
**P.O. Life Cycle**

1. Shopping cart (catalog requests)
2. Requisition
3. PO Approval
4. Penn sends email or fax
5. Items shipped
6. Vendor Invoices AP*
7. Payment Sent to Vendor
8. PO Closed
9. Payment Queued
10. Holds Resolved
11. Packing Slips**
12. Invoices on Hold

* To cancel an item or purchase order, please contact the vendor first and then forward their confirmation to the NSCI-business@lists.upenn.edu so that we can also remove it from our system.

** Please forward all packing slips to 202 CRB
Vendor Information

Look up information BEFORE starting non-marketplace P.O.

Terms = Number of days between AP receiving the invoice and processing payment.

Only when the vendor P.O. Site = N can a purchasing card be used.
Account Favorites

- User Preferences (once you are Requisitioner)
- My Profile
- Add a Favorite Charge Account(s) if desired, by clicking on [Add a Row]
- Add as many accounts as needed. Be sure to click on [Apply] periodically.
  - Favorites contain an object code i.e. 5228 (lab supplies)
Non-Marketplace Item Type: Quantity vs Amount

- **Goods Billed By Quantity** - when you are ordering items that will be billed by the supplier using the quantity i.e. 10 cases of gloves
- **Goods Or Services Billed By Amount** - when you are ordering items that will be billed by the supplier using the amount i.e. catering or service contracts
- **Services billed by quantity** - DO NOT USE

**Category Matters Too!**
Frequently Used Codes:
- COMPUTING.SOFTWARE
- RESEARCH.HAZARDOUS
- SERVICES.CATERING
- SERVICES.PRINTING
- SERVICES.REPAIRS
- SERVICES.WASTE DISPOSAL
**PO Approvals**

**What you enter:**

- Item Description
- Category
- Quantity
- Unit Price

**What we see:**

- Item Description
- Category
- Quantity
- Unit Price

**We do not see:**

- Category, Unit Price, Supplier Site, Additional information, Supplier Contact information, Ship-To Location

**We can only change:**

- Quantity and Account #

*Best Practice:* Add Quote Number to Item Description as well as Additional information!
The purpose of this form is to show authorized approval for an order on the appropriate account(s).

- One vendor per form
- Include requisition number
- Enter only quantity and unit price; extended price automatically calculated and grand total (from both pages).
- Complete with full and proper vendor name (DSHB = University of Iowa)
- Include scientific justification if dual purpose (paper towels are blotting materials; -80 freeze markers)
- You do not need to enter the full 26-digit code but a nickname or unique reference #. (Song R35; Opto)
- Fill and Sign or Digital Signature preferred
What is missing?
Specialty Purchase Orders

- Blanket/Standing Orders (Curtis Bay, Ready Refresh, AWS, Cintas, Addgene, AirGas)
  - Complete dollar value for 3-12 months of services but should not cross fiscal or grant years.
  - New p.o. must be generated when current p.o. fully spent or when notified by Business Office (change of fund number, change of pricing)
  - Work with individual vendors to complete orders as needed (Addgene website, AirGas delivery schedule)

- Equipment: A single item over $5,000 and a useful life greater than 1 year.
  - In the email with the form and quote where applicable, you must include the future building location and room number, PI name and a contact phone number.

- Independent Contracts: Prior to any work being completed, contractor and lab contact must complete “Independent Service Provider Questionnaire” for Departmental and HR review and approval. Contractor must be added to vendor system and a P.O. be processed for the contractor to invoice against, in order to receive payment.
Purchasing Card Form

- New form forthcoming
- Confirm vendor not eligible for BEN Purchase Order
  - Some items are listed as restricted in Amazon as they should be purchased through BEN.
- Ensure URL(s) or complete item description is included
- Clearly list quantity requested for each item
- Include account(s) to charge name/number
- Fill and Sign or Digital Signature preferred
- List ship-to contact name and address as well as shipping method, if rush delivery is needed
Have a question? Just ask; call or stop by!

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Future Topics

- Concur: Booking Flights, Submitting Reports, Per Diem, Receipts, Warnings
- Purchasing Card / Travel Card / GreenPhire
- Express Mailing (eSHIP)
- Approvals (Poster Printing, World Travel Flights, Alcohol, OSL, Hotels, ULAR)
- Service Centers: what are they, where are they and how to access
- Our mail room and gaining access 200D CRB
- ???