6.3 Purchasing Guide

Steps to Make a Purchase

1. Purchasing request is submitted to administrative assistant.

2. Administrative assistant confirms the budget/project and initiates purchase or vendor/blanket invoice payment request and routes to appropriate personnel for approval. Note: PI approval is required for all grant or contract purchases/expenditures per BPPM 40.01.

   a. Purchases are processed within 1-3 business days depending upon availability of personnel for signature authority approval. Shipping times may vary depending upon vendor and product availability.

3. Efficient purchase or payment method is determined and processed accordingly.

4. The purchasing card is available for checkout with the administrative assistant during business hours (M-F, 8am-5pm). Original receipts must be returned when the purchasing card is returned. The purchasing card is reconciled by the administrative assistant in conjunction with the administrative manager and signed by the director as Authorizing Official per BPPM 70.08. To check out the purchasing card, students, faculty, and staff must be on a current paid appointment with WSU.

5. Expenditure transfers are processed by the administrative manager as necessary.

6. The administrative assistant serves as the point of contact with central offices regarding purchasing and accounts payable.

7. Non-Grant Contracts:

   a. Hotel Contract – initiated between the SDC and facility; the SDC submits the contract to Business Affairs Contracts Office, for contract negotiations with the facility. Review and approval may take three weeks or more at the Contracts Office. A copy of the signed final contract is required to pay invoices.

   b. Rental Agreements, Lease and Land Use Contracts – SDC works with Business Affairs Contracts Office directly.

8. Gift Transmittal Form and the funds received by the SDC are processed by the SDC and walked to the Alumni and Friends Office per BPPM 30.70.

9. Petty Cash and Till Cash, Cash Registers, POS, processed per BPPM 30.50 and 30.51.

10. Record Retention-the SDC will follow the All-University Records Retention Schedule per BPPM 90.01.1.

11. Request to Serve Food will be prepared and authorized in the SDC.

12. Property inventory-University >5000 and Department <5000 Inventory per BPPM 20.50.