

**Procurement of Supplies and Services less than \$5000
Step by Step Procedure¹**

Category: All personnel involved in procuring supplies

Applicable Ranks: Professors, Research Assistant Professors, Post-doctoral scholars, graduate students, research technicians, administrative staff.

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Step	Action	Responsible Person	Duration
1	Determine: 1. If the supplies can be found in one of the catalogs located on the eProcurement website, go to Step 2 2. If NOT, go to Step 4	Lab personnel ²	N/A
2	Place order from vendor site in eProcurement ³	Lab Personnel ⁴	N/A
3	Business Office approves and transmits order to vendor by next business day. Go to Step 8.	Business Office staff	Same day as receipt
4	If supplies must come from a vendor not in eProcurement, complete General Order form and submit to ESOPFINANCE@UNC.EDU with the name of the PI and Division in the subject line and indicate if request is CRITICAL by adding the word URGENT. MUST USE ESOP BUSINESS OFFICE ADDRESS AS BILLING/INVOICING/"SOLD TO" ADDRESS (see General Order Form)	Lab Personnel	1 day
5	Procurement Specialist checks the account for sufficient funds and creates a soft encumbrance to the account	Business Office Staff	Same day as receipt
6	Business Office issues S# to requestor by return email. If the vendor is not currently in the University database, an additional step is required which may delay issuance of S#.	Business Office staff	1 day
7	Using the S# provided, Requestor places order with the vendor. Obtain an order confirmation either by email or fax	Lab personnel	1 day
8	For either eProcurement orders or orders placed with an S#: when order is received, confirm the order and sign the packing slip(s). Attach packing slips to order form and place in local basket for pickup	Lab personnel	Immediately after order arrives
9	Order documents are picked up and filed to await MMD statements or the invoice	Business Office staff	N/A
10	Once MMD is received, packing lists are attached. In the case of S# type orders, once the invoice is received, it is matched to the packing slip. Appropriate payment documents are then generated.	Business Office staff	5 days
11	Business Office faxes the completed check request to Disbursement Services	Business Office staff	1 day

1. All maintenance contracts, orders for radioactive material not purchased through Perkin Elmer, and purchases of certain controlled substances must be done on a Purchase Order even if total is less than \$5000.
2. Purchases from accounts belonging to other departments such as Chemistry, LCCC, etc. must be placed with that department.
3. IT purchases (computers, printers, monitors or software) are described in a separate workflow.
4. Divisional administrative support persons should place orders for office supplies.