

Procurement of Supplies and Services totaling more than \$5000¹
Step by Step Procedure

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	Obtain a quote for item(s) from the vendor Consider whether purchases will be frequent and for the same item in which case a standing order should be established.	Lab personnel	1 day
2	Complete any information on the General Order form not included in the quote (i.e., requestor name, delivery location, account number) and, if applicable, a Waiver of Competition form and a sole source justification. Submit all information to ESOPFINANCE@UNC.EDU with the name of the PI and Division in the subject line.	Lab Personnel	1 day
3	Business Office prepares Requisition and sends to Central Purchasing for bidding and issuance of Purchase Order	Business Office staff	1 day
4	Business Office personnel notifies requestor when Purchase Order has been created and possible delivery date. If a standing order has been established, Business Office personnel provides W# .	Business Office staff	3 - 10 days
5	Copy of purchase order is maintained in appropriate account file in the Business Office for future reference	Business Office staff	immediate
6	In the case of a standing order, lab personnel should consult with Procurement Specialist to obtain W# and ensure enough money is available to cover the anticipated purchase.	Lab Personnel/ Procurement Specialist	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 regardless of total purchase amount.