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## PURCHASING POLICY

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In addition to department policies, it is your responsibility to review and understand the following:

- University Policy 3-100: Procurement (<https://regulations.utah.edu/administration/3-100.php>)
- University Policy 3-003: Authorizations and Approvals Required for Financial Transactions (<https://regulations.utah.edu/administration/3-003.php>)
- University Policy 3-010: Expenditure of University Funds & Personal Reimbursements (<https://regulations.utah.edu/administration/3-010.php>)
- University Rule 3-010A: Expenditure and Reimbursement Requirements (<https://regulations.utah.edu/administration/rules/R3-010A.php>)
- Policy 3-031: Recruitment and Entertainment Expense Reimbursement Policy (<https://regulations.utah.edu/administration/3-031.php>, and <https://fbs.admin.utah.edu/download/guidelines/Guidelines3-17-04.pdf>)
- University Procedure P3-100D: Gift Card Purchases and Requirements (<https://regulations.utah.edu/administration/procedures/p3-100d.php>)

If you have any questions, please send an e-mail to [bmepurchasing@utah.edu](mailto:bmepurchasing@utah.edu), call 801-581-8528, or stop by the BME department office in SMBB 3100 during business hours.

**The Biomedical Engineering Department has the right to deny or revoke any purchase order or reimbursement request that is not in compliance with Department or University policies and procedures.**

### Processing Times

- All BME Purchasing Requests, or UShop Cart Assignments, typically require one business day to process.
  - During the first three weeks of the semester, it may require two or more business days, depending on operational constraints.
- **Purchase orders might not be processed after 3 pm, depending on the operational constraints of the staff.** Any order received after that time will be processed the next business day.
- Any same-day or overnight air shipping requests **must be submitted before 12 pm (noon).**
- **Animal orders need to be submitted at least 2 weeks prior to the requested arrival date.**
  - When submitting the BME Purchase Request for animals, include the protocol number from eSirius.
  - Attach a quote from the vendor to the BME Purchasing Request or email to the [bmepurchasing@utah.edu](mailto:bmepurchasing@utah.edu) so that the UShop Requisition is correct and OCM can use the attached quote.
  - Animal scheduling (tech services) needs to be emailed to OCM by the Wednesday prior to the requested delivery date (e.g. Wednesday the 5th for procedures the week of the 10th).
  - For animal deliveries, if a representative of the lab isn't there to receive animals within 15 minutes of the scheduled delivery time, OCM charges a late fee.
- The department must be notified of any purchases related meals event **at least 5 business days prior to the event.**

## Purchase Order Requirements

- **All Purchases require formal approval by Faculty/Department Account Executive.**
  - Purchase orders will not be processed until all required approvals have been given.
    - If your order has not been approved, you are responsible for contacting the approver. **Department staff are not responsible to facilitate approval on your behalf.**
  - If you are not sure who needs to approve a purchase order you've placed, please contact BME Staff through [bme purchasing@utah.edu](mailto:bme purchasing@utah.edu).
  - There are three ways to purchase goods or services through the department:
    - Create a BME Purchase Request (<https://admin.coe.utah.edu/purchasing>)
    - Assigned cart in UShop from the PI to a BME staff member.
    - Requisition in UShop is approved by PI.
  - UShop Purchase Orders cannot have multiple vendors. We have been asked by Accounts Payable to discontinue the practice of adding multiple vendors as invoices are more difficult to pay correctly.
  - Any purchases that require a BME Staff PCard will need to have a BME Purchase Request that is approved by a PI, even when the PI is the requestor as well as the approver.
- You are responsible for ensuring the BME Purchase Request, (UShop cart or UShop requisition), contains all required information. This includes accurate vendor information, product details, desired shipping address, pricing, etc.
  - Any missing or incorrect information will delay your purchase until it is resolved. You are responsible for providing necessary corrections in a timely manner.
  - The department is not liable for any order issues caused by inaccurate information provided by the purchaser.
- Once a purchase has been delivered, please return the Packing Slip and verify that the purchase is complete and correct. Any incomplete or incorrect shipments need to be resolved with the BME staff as soon as possible.

## Purchase Limits

- No commitments exceeding \$5,000 can be made prior to the University Purchasing Department's review and approval.
- **If you have a purchase that is \$5,000 or more, BME staff will be in contact when the BME Purchase Request, or UShop order, is submitted to confirm all the necessary documents are included.**
- University Policy R3-100B: <https://regulations.utah.edu/administration/rules/R3-100B.php> requires any single item purchase over \$5,000, will either need to have a Sole Source Procurement Process Request Form attached to the UShop requisition, or the purchase will need to be sent through the RFP process.
- Utah State Procurement code prohibits order-splitting to avoid the single procurement threshold (the PCard single transaction limit/small dollar threshold).
- University Policy 1-006: <https://regulations.utah.edu/general/1-006.php> requires that all employees involved in the procurement process disclose Conflict of Interest within 30 days if you acquire or

discover new significant financial interest (e.g., through purchase, marriage, or inheritance) that are relevant to your professional responsibilities to the University.

- Conflict of Interest Reporting must be renewed at least once a year, even if no new disclosures are needed. Visit <https://coi.utah.edu/> for more information.
  - If you are not sure what a Conflict of Interest is or if you may have one, contact BME staff before making the purchase request.

## Purchase Reimbursements

- **The University strongly discourages the use of an individuals' personal funds for any purchasing.**
  - Even though the use of personal funds is NOT the preferred method of procurement, it may be necessary in certain emergencies/circumstances. Employee reimbursement is for expenses incurred on behalf of the University. **Students should not be purchasing on behalf of the University.**
- Individuals purchasing on behalf of the University are prohibited by Utah State law from using the University's Sales Tax Exemption certificate when using their own personal funds.
  - **The University does not reimburse sales tax unless the reimbursement is for a business meal that is at maximum 10 people.**
- Requests for reimbursement should be made within **30 calendar days of purchase** and will not be processed until all required documentation is received.
  - All reimbursements must be submitted **30 calendar days prior to end of fiscal year.**
  - All reimbursements for grants must be submitted **30 calendar days prior to the closing of the grant.**
- Reimbursement requests can be made in person, via e-mail to [bmepurchasing@utah.edu](mailto:bmepurchasing@utah.edu), or through the department purchasing system.
  - You must provide the original receipt, the project/activity number being charged, and the business purpose of the purchase.
    - If the purchase was a business meal, you must provide a list of all of the attendees and their affiliation with the University of Utah (student, employee, guest, etc.) in order to determine if extra documentation is needed.
- **Individuals purchasing on behalf of the University are prohibited by Utah State law from using the University's Sales Tax Exemption certificate when using their own personal funds.**
  - The University does not reimburse sales tax unless the reimbursement is for a business meal that is at maximum 10 people.