Purchasing SOP

Documents Required:

- Purchase Order (PO) Form
- UW Procurement Sole Source Justification Form (If applicable)
- Quote (If applicable)

Workday Requisition: Preferred method of purchasing, purchases over $10k, and M&E tax exemption
Procard Purchases: Only for small purchases, one-time purchases, or a purchase with a non-UW supplier.

Pre-Order Process:

- Requester submits a purchase request(s) using a PO form to their respective Division Administrator or to pedorder@uw.edu. Request must have pre-authorized approval for worktag(s) used and complete ALL necessary information.

- For purchases over $10k, the UW Procurement Sole Source Justification form is required. Submit the form and attach a copy of it to the PO form. Additional information may be required. Pedorder will follow up with the requester.

- For M&E sales tax exempt purchase, a M&E statement is required. To be eligible for M&E tax exemption, all requirements below must apply.
    - Equipment has a useful life of more than one year
    - Equipment will be used more than 50% annually on qualifying research
    - Equipment has an acquisition cost of $200 or more

- Orders submitted in Workday will be routed for review and approval by authorized personnel. PO is sent back to the requester if additional information is required.

- To look up suppliers in Workday, search in the Workday search bar: Find Suppliers to determine if that supplier is registered in Workday.

- If supplier is not registered, Pedorder can start the registration process, which can take up to a few weeks. Provide the supplier's name, contact, and email to pedorder@uw.edu. Pedorder will submit a UW Connect ticket. Or if this is a one-time purchase, Pedorder can purchase this via Procard, reach out to Pedorder.

Catalog/Non-Catalog Order Process in Workday:

Only personnel who have Requisition Requester security roles can place orders. If you do not have this role, fill out a PO form, including any applicable documentation, and e-mail the request to pedorder@uw.edu.

Open Workday, https://wd5.myworkday.com/wday/authgwy/uw/login.htmld, login with UW Net ID and password.

Click on the links below for the UW Job Aids on how to create a Workday requisition:

- Catalog Order
- Non-Catalog Order

Resources:

Procurement help line, 206-543-4500, pcshelp@uw.edu, https://finance.uw.edu/ps/

Sole Source Justification: Sole Source Purchasing | Procurement Services

UW Procurement Services Sole Source Justification Form: UW Procurement Services Sole Source Justification Form

M&E Statement Examples: M&E Statement Examples | Equipment Inventory Office

Pediatrics Facilities/Equipment Inventory, Neil MacLeod, nmacleod@uw.edu