

**Department of Medicine
Boston Medicine Center
Research Supplies Ordering Protocol**

Preparation of PO and Training

- GM in collaboration with PI develops a monthly lab supply budget to include animals and Core usage (per project or lab as appropriate). GM and PI will decide whether the PI will review orders prior to submission.
- GM meets with LM on a monthly basis to accomplish the following:
 - o review project account numbers
 - o review budget vs. actual expenses by project
 - o provide initial training for both online ordering (Lawson Requisition Center (RQC) and paper requisitions
 - o LM creates spreadsheet in DOM-Storage.
 - o LM places order and records order information on spreadsheet.
 - o DOM-Storage is shared with GM to provide backup support as needed.
- LM completes PO requisition including
 - o Financial information (accounting unit, activity number, detail account and account category and submits to the GM for signature.
 - o If the total amount of the order exceeds a previously agreed upon amount, the LM will obtain the PI's signature prior to submitting to the GM.
 - o All POs should include the email address and phone number of LM and GM.
- If a new vendor is to be used, a completed Vendor Add Form and Vendor W9 should be included with requisition.
 - o GM can use Lawson to verify/confirm vendor status.
 - o Please factor in additional time if a new vendor addition is required (5 business days).

Paper Requisitions

- ALL requisitions that exceed \$2,500 must be co-signed by Grant Accountant prior to submitting to Purchasing.
- The PO Requisition is time stamped by LM or GM, with the time of day and date it was received by Purchasing
- The PO Requisition is reviewed by the Purchasing Operations Supervisor within one day for the following:
 - o Signature authority
 - o Accurate account information
 - o Appropriate back up documentation
 - o The completeness of the paperwork; cost, description, quantity, delivery location
 - o Contact information including email and phone number for LM and GM
- The PO Requisition is distributed to the Evans Buyer within one day
- Buyer reviews supplier pricing. It is not necessary to re check all the information on research orders.
- The order is placed within 1-2 business days of time stamp with the exception of new vendors.

- The pink portion of the PO Requisition is sent back to LM and GM by email
- The original PO Requisition along with any accompanying documentation is filed
- When available, the LM adds the PO# to the spreadsheet (as noted above).
- If a PO # has not been generated (via Lawson, interoffice mail, email or phone as requested), the GM will contact Purchasing
- If the item(s) has not been received in a timely manner (within 5-7 business days), the LM will contact the vendor to inquire as to the status of the order. The LM will fax the PO to the vendor if the order was not received by the vendor. Purchasing could also be contacted to follow-up with the vendor.
- LM will retain all packing slips and cross-reference with the paper requisitions on a weekly basis to ensure that all items ordered have been received.
- At the close of the month the GM will reconcile accounts and provide a detailed list of lab purchases and expenses (non-personnel) for the PI and LM.

The Return of Incomplete Paperwork:

- The Buyer or the Supervisor will call and email the end user explaining what is wrong with paperwork within one business day.
- The PO Requisition is annotated with the individual called, the email address, along with the date and time contacts made. If a response by LM or GM is not received within one day a second email will be sent.
- If the Buyer or the Supervisor does not receive an email back from the LM or GM to make corrections, the PO Requisition is sent back via interoffice mail by the close of the following business day, with a buck slip noting the areas that need correcting

Follow-up to Back Orders, Pricing and Overspent PO's:

- Back Orders:
 - o The Buyer will notify the LM or PM by email within one business day when they receive a conformation of a Back Order from the vendor
- Pricing:
 - o The Buyer will accept the cost that is on the invoice if it is lower
 - o The Buyer will notify the LM or GM if the confirmation or invoice is higher the PO amount
 - o On research supplies there will be no changes or substitutions without consulting LM
- Over-spent OPO's:
 - o It is the responsibility of the GM to monitor their OPO's by running weekly Lawson reports
 - o If AP notifies Purchasing that an OPO is overspent, the Buyer will inform the GM by email

Adding a New Vendor:

- LM or GM will obtain the W9 form from the vendor
- LM or GM will complete the Add New Vendor Form found on the BMC internal website in the Finance section
- LM or GM will submit both forms to Purchasing for review and approval within one business week.

Lawson Requisition Center (RQC)

- LM submits order online via RQC and records order number.
- If a new vendor is to be used, a completed Vendor Add Form and Vendor W9 must be submitted to Accounts Payable. LM or GM can use Lawson to verify/confirm vendor status. Please factor in additional time if a vendor add is required.
- LM uses RQC to obtain PO# within 2-3 hours of the original submission.

LM and GM Accounting and Follow-up

- If ordered item(s) has not been received in a timely manner (within 5-7 business days), the LM will contact the vendor to inquire as to the status of the order. LM will fax the PO to the vendor if the order was not received by the vendor. Purchasing could also be contacted to follow-up with the vendor.
- LM will retain all packing slips and cross-reference with the paper requisitions on a weekly basis to ensure that all items ordered have been received.
- At the close of the month the GM will reconcile accounts and provide a detailed list of lab purchases and expenses (non-personnel) for the PI and LM.
- LM will review spreadsheet to compare with GM records to ensure that the lab does not exceed the monthly budget or is charged incorrectly.

Legend:

GM = grants manager

LM = lab manager or designated purchaser

PI = principal investigator

Administrative Manager is responsible for training the GM and will provide backup to the GM as needed.