Policies: Purchasing

The Physics Department adheres to UW Procurement Services policies and recommended methods for purchasing. Complete information on how to buy your supplies, services and equipment can be found at: http://f2.washington.edu/fm/ps/how-to-buy.

Here is an at-a-glance list of most common purchasing methods in Physics:

- Purchase orders: For equipment and large purchases over $3,500; and items not available in eProcurement, cannot be purchased with ProCard, require a sole source justification, require a competitive bidding process, require a signed contract.
- eProcurement: This is the preferred choice for purchasing.
- ProCard: The second choice for research groups who purchase a larger number of items. We recommend that one person in each group be responsible to get a ProCard and make the purchases. The third choice is to have the Fiscal Specialist purchase items on their ProCard.

Frequently Asked Questions

Purchase Orders

- What is the formal bidding process for equipment?
- Do I need a sole source justification?
- Is my equipment purchase tax exempt?
- Is prepayment allowed for purchases?

Procurement Card (ProCard)

- Do I need a ProCard?
- If I don’t need a ProCard, who do I contact to make a purchase?
- How do I apply for a ProCard if needed?
- What is required to be approved for a ProCard?
- What can I buy or not buy on a Procard?
- Who do I give the receipts and packing slips to?
- When is the documentation due?

eProcurement

- What is eProcurement?
- What can I purchase through eProcurement?
- Why should we use eProcurement?
- Who should I contact to order supplies through eProcurement?
- Who do I give the source documents to?

How do I know which is best for me to use? A ProCard or eProcurement?
Purchase Orders

**What is the formal bidding process for equipment?**

To determine the required solicitation process, see [UW Solicitation Process](#).

**Purchase Checklist - Goods and Services ([PAS Related Forms](#))**

**Do I need a sole source justification?**

The following list of criteria may be used, but is not restricted to, in determining if a single or sole source situation exists:

1. Only one manufacturer makes the item meeting the salient specifications; and that manufacturer only sells direct or exclusively through one regional or national representative.

2. The item required must be identical to equipment already in use by the end user, to insure compatibility of equipment, and that item is only available from one source; same reasoning applied in the continuation of research situation.

3. Collaborative project, interagency agreement or clinical trials where the identical equipment is required for compatibility and continuity of research.

4. Maintenance or repair calls by the original equipment manufacturer (O.E.M.) are required for a piece of equipment, and the manufacturer does not have multiple agents to perform these services.

5. Replacement or spare parts are required from the O.E.M., and the O.E.M. does not have distributors for those parts.

6. Patented items or copyrighted materials, which are only available from the patent or copyright holder.

7. A medical/surgical decision by a medical/dental professional, where a specific brand is required for patient care, and the manufacturer has no multiple distributors for the product.

8. Only one quote or bid response is received as a result of a competitive solicitation.

- [Sole Source Justification Matrix](#)
- [Sole Source Form](#)

**Is my equipment purchase tax exempt?**

To qualify for the M&E sales and use tax exemption, equipment must:

1. Have a useful life of more than one year;
2. Be used more than 50% annually on qualifying research; and
3. Have an acquisition cost of $1,000 or more.

Is prepayment allowed for purchases?

The University generally cannot make payment for materials until they are received or for services until they are rendered. To do so is considered lending the credit of the state and is not permitted by state law. The allowed exceptions are listed below:

1. Postage, Publications, Membership Dues
2. Maintenance Contracts
3. Registration Fees
4. Software Licenses
5. Travel Associated Fees

ProCurement Card (ProCard)

Do I need a ProCard?

If you or your research group averages 5 purchases or more a month under $3500, you or one of the members of your group should consider applying for a ProCard.

If I don’t need a Procard, who do I contact to make a purchase?

The Fiscal Specialist has a ProCard for those occasional purchases that fall under the $3500 limit.

How do I apply for a ProCard if needed?

The ProCard applications and instructions can be found at the [UW Procurement Card Services website](#).

What is required to be approved for a ProCard?

After you have completed the form, bring it to Michael Kummer in room C-121 (the Physics/Astronomy main office) for Departmental approval. A Procurement Card training course is required before the Procard will be issued.

What can I buy or not buy on a ProCard?

Here are the most common concerns we see in Physics.

- Equipment over $2000 needs to be inventoried. Please see the Fiscal Specialist for inventory instructions.
- No travel expenses can be charged to the ProCard.
- Conference registration can be purchased on a ProCard.

More information will be included during the training course.

Who do I give the receipts and packing slips to?

Stephen Higgins is the Department Reconciler and should be given all receipts and packing slips promptly upon receipt of goods.

When is the documentation due for reconciliation?

The reconciling deadline varies from month to month but generally occurs on the first week of the month following the billing period. You will be notified by email when your paperwork is due.
eProcurement

What is eProcurement?
eProcurement is the quickest, most convenient way to order online from many vendors contracted with the University of Washington. Please see the eProcurement website.

What can I purchase through eProcurement?
Anyone with a valid UW Net ID and password can view the online catalogues. A list of the vendors can be found on the eProcurement website.

Why should I use eProcurement?
The University receives a discount from the vendors who contract through eProcurement.

Who should I contact to order supplies through eProcurement?
The Fiscal Specialist can order supplies directly through eProcurement. You can also order your own supplies. Please see the training formats on the eProcurement Card training for setting up your account.

Who do I give the source documents (receipts and packing slips) to?
The source documents should be given to the fiscal person who manages the charging budget.

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