

Procurement

(make group procurement log with google spreadsheet)

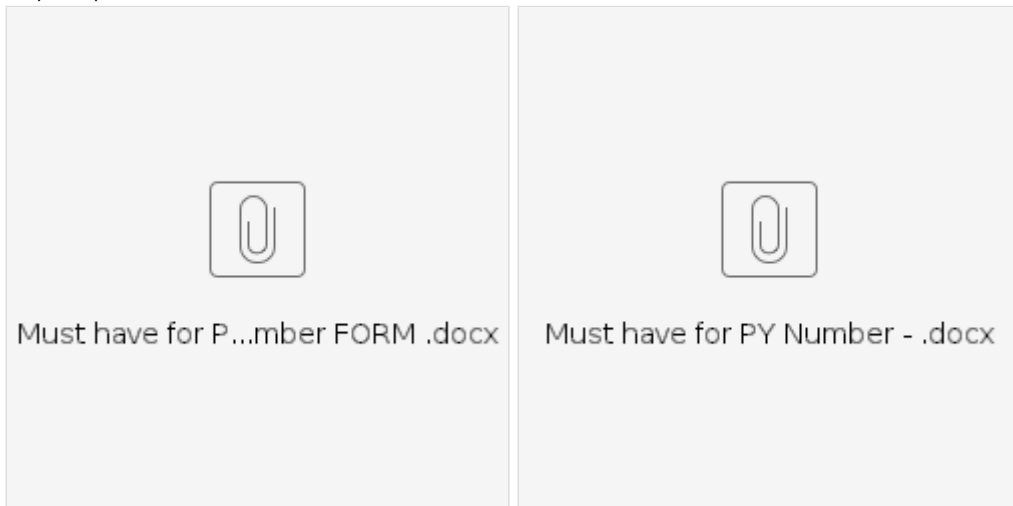
Considerations before purchase order

- Consult Dustin when the cost of a purchase is beyond \$1000.
- Never order something you can't defend and try to think economically but also effectively.
- Don't select the more expensive item unless its more cost effective in the long run.

Standard Procedure

Step to order:

1. Download the order form and fill it out: [Order Form](#)
Sample requisition form, and instructions:



2. Using your UVA email send your order to: phys-stockroom@virginia.edu (please use only this email)
3. Once the order has been submitted, fill the Monthly-Procurement here: [Monthly Accounting](#) ***
4. Upload the order form to the Group Drop-Box here: [Purchase Order Records](#)
New Folder: [New Folder to upload purchase request forms \(need UVA ID credentials\)](#)

Note:

*** There are three spreadsheets (for each PTAO) per month namely **A** (standard/old PTAO), **B** (standard/old PTAO with PY number), **C** (PTAO with limited finds for in-cave constructions)

So, please use the correct spreadsheet for each order, depending on the PTAO that you use.

Check this page for more details: [PTAOs](#) <-(click here)

A sample email to Dawn, Faye and George ([don't forget to cc Dustin](#))

Dear Dawn, Faye, and George,
Please proceed with the attached purchase-request items from <https://www.mcmaster.com>
(purchase request file is attached) **to be delivered at the NM4 building at the Fermilab.**
Please use PTAO ##### (mention the relevant PTAO)

Direct links:

1. <https://www.mcmaster.com/3060T49/> (Qty 6)
2. <https://www.mcmaster.com/3115T21/> (Qty 3)
3. <https://www.mcmaster.com/3115T17/> (Qty 3)

Thanks.

Don' forget to attach the purchase requisition form

Special Procedure

You could take this procedure in case of small purchase. It is acceptable thanks to George.

1. E-mail George <gls8b@[virginia.edu](mailto:gls8b@virginia.edu)> with the links to the items and the number that you need. Do not forget to provide the PTAO and the shipping address.
2. CC the message above to Ernesto (or Ishara) so that we can keep track of the expenditure in the spreadsheets.

Self Purchase Order and Reimbursement

Valid cases

- Budget = PTAO A
- Seller = Local stores, Online shopping sites

Procedure

1. Decide purchase items.
 - a. Consult Dustin when the cost of a purchase is beyond \$1000.
2. Place an order
 - a. Use your own billing and shipping addresses??
3. Make a record onto the group spreadsheet.
 - a. Do this at this timing??
4. Receive all items.
5. Make and submit a document for reimbursement.
 - a. Scanned copy or downloaded file of receipt.
 - b. To Dawn Shifflet via e-mail.
 - c. Multiple receipts can be submitted at once.
 - d. Example — to be written.
6. Receive an e-mail to check and approve the reimbursement.

SHIPPING PROTOCOL

1. Make an inventory list that you want to ship here: [Shipping Inventory](#)
2. Download the shipping form: [Shipping Form](#)
3. Fill in the shipping form:
 - a. Measure the dimensions of the shipping container
 - b. Measure the weight (available in the loading dock)
 - c. Unless there is a special request, use the normal shipping (2 days FedEx)
 - d. Put the insurance according to the Insurance policy (TBA soon)
4. Fill the expense in Monthly-Procurement: [Monthly Accounting](#)
 - a. Put the tracking number in the description column
5. Send the shipping form to Dawn Shifflet: dbs5s@virginia.edu
6. Upload the shipping form in the Group DropBox : [Shipping Records](#)
7. Contact the person in charge at the shipping destination and share the information (inventory list and tracking number).

[Common Shipping Addresses](#)

Other useful information

DigiKey ID: **14267801** (Created by DigiKey on 06 Jan 2022 during a phone call to request information on Vishay resistors for target stick)