

Invoice & Purchasing Guidelines for the Crop and Soil Science Department

The objective of this document is to provide you with guidelines on how to make different kinds of purchases – where the company will invoice, where they will not, where local companies allow direct billing, etc. Details on how to make each type of purchase are given below. If you have questions or run into a situation not covered, contact Emmalie Goodwin.

1. Company Will Send Invoice

- a. You can contact the company directly or contact Emmalie to place the order for you. There are several companies in Corvallis that will send invoices for payment. If you are going to be purchasing at a local business, tell them you are with OSU and what department you are with and ask if they invoice directly. We do not have a list but if you ask me I might know if a business will do this.
- b. Make sure your contact name and index are on the order so when the invoice is received it can be matched up for payment. Use your index for the PO number whenever possible.
- c. Invoices should be sent to:
107 Crop Science Building
Corvallis, OR 97331
- d. Signed receipts can be sent to Emmalie for backup.
- e. Packing slips- the packing slip can be sent to Emmalie if signed by the PI or other authorized signer that the invoice is okay to pay once it arrives. The slip must have signature and index. Blank packing slips are not needed and can be recycled.
- f. Once invoice is received if a signed packing slip has not been provided, the PI will get an email from the business center for authorization for payment and a request for the index to charge.

A few local stores that will invoice the department directly (check with Emmalie for procedures before you shop since they are different at each store):

American Dream Pizza-campus
B&J Bookbinding
Fred Meyer

Market of Choice
Taylor Street Ovens

2. Company Won't Send Invoice

Purchases can be made by Emmalie using the departmental credit card.

'Real time' purchases are things like registrations that require a credit card to be put in at your computer in your office. Purchases by credit card can be made up to \$5000. Any amount over that needs a purchase order that is processed through the AMBC business center.

Purchasing Authorizations

Since credit card purchases are real time the business center needs to make sure they are properly authorized. Any purchases that are not made by the Principal Investigator (PI)/ Researcher need to have prior approval. **If you are a research assistant or student you need to get approval before I can purchase items for you on the credit card.**

There are three ways to do this:

- Send the request to the PI and they can forward it to me with the approval to purchase. (Preferred method)
- When you send me the request, “CC” the PI so they are aware of the purchase. It is then up to the PI to let me know of any problems.
- If it is a request in writing you can have the PI sign somewhere on the hard copy or send a note with authorization for payment.

A PI may authorize a blanket purchasing authority for research assistants. Once authorized, the assistants would be able to purchase without contacting the PI. This would mean that the PI would have no knowledge of purchases made for their project with the credit card. Since this is paid for at the time of purchasing there is no invoice sent. Students are not allowed blanket authority and must go through one of the three previously stated methods for approval.

If you would like to set up purchasing authority for an assistant send me an email with the following information:

- Name
- Indexes authorized to purchase on
- Dollar limit

How to Purchase

To make a purchase, send me an e-mail stating what the item is (with a link if you have it), the index to charge to, and if you want any other shipment method than the standard. You will need to provide a grant or state index number, ARF numbers cannot be used. If you need something by a certain date let me know and I can try to accommodate that.

3. Purchase Items Through Auto Pay Vendor

- a. There are several companies that will send invoices directly to central billing; they are not sent to the department for processing. The index that you provide them is the index that will be charged.
- b. You go into the store and tell them you are from OSU Crop and Soil Science, show them your University ID, and give them your index to charge.
- c. Bring the receipt to Emmalie for her files.

For Ag Research Foundation dollars you must be explicit and indicate Ag Research Foundation, NOT OSU. See me if you want to pay with ARF funds.

List of Commonly Used OSU Auto Pay Vendors

BiMart	Robnett’s Hardware
Corvallis Napa Auto Parts	Smith Glass
Fisher Scientific	VWR
Grainger	Willamette Graystone
OSU Beaver Store	

4. Purchase Items Yourself and Get Reimbursed.

- a. Purchases under \$100 can be done by you with your own money. Be sure to check with the business to make sure they will not invoice us directly.
- b. Save all receipts.
- c. Fill out a Reimbursement Request form with detailed reason for purchase and index to charge, sign it and have your supervisor sign as well. **These need to be submitted within 60 days of the purchase date.**
- d. Send completed form with receipts attached to Emmalie for submission.

Purchase Orders

If a company requires a PO to be done, contact Emmalie and she can create one. For purchases over \$5000, contact Darlene Parks in the business center.

Purchasing Authority

Pre-authorization to purchase items is not necessary for invoice purchasing. Unlike credit card purchases the items are not paid for until they arrive. It is up to the PI and his/her staff and students to purchase responsibly and within the guidelines of the project.

Signing Authority

All invoices need to be approved for payment by the PI or someone authorized by the PI for signing authority. PI's may designate a research associate to sign and authorize payment of invoices in their absence. Requests for authorization for payment of invoices will come electronically from the business center. Packing slips may be signed by designated signers with index indicated on the slip for payment. If that is done then no request for payment will be sent; the signed slip will serve as authorization.

I hope this is helpful and feel free to ask me any questions!

Thank you,
Emmalie

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