

Civil & Environmental Engineering Department Purchasing Process

PURCHASING METHODS

UCLA provides several options to purchase goods/services from vendors and has vendor agreements in place. **When in doubt on which method to use, please email ceehelp@seas.ucla.edu and one of the department staff will advise you.**

A. PURCHASE ORDER (PO) REQUEST – PREFERRED METHOD

Purchase Orders are intended to streamline the process for smaller, low-risk purchases, where the involvement of Purchasing is unlikely to net a better deal. Departments are authorized to place low-value, N-class orders for up to \$5,000 per vendor per account per day in BruinBuy, UCLA's online purchasing application. A PO should be issued at the time of order or commitment to the vendor. It protects the University, complies with policy and confirms the agreement with the vendor.

The PO is the preferred method for purchasing. Please submit the [Purchase Order request form](#) along with any quotes to ceehelp@seas.ucla.edu for processing.

Setting up a new vendor - If the vendor is not set up in the UCLA purchasing system and you will be working with the vendor on a regular basis, we can set them up as a preferred vendor. If the vendor is willing to become a preferred UCLA vendor and agrees to payment terms of "Net 30", the vendor needs to be onboarded via [PaymentWorks](#). A PaymentWorks invitation will be sent to the vendor, and the vendor will complete the registration process. This usually takes 2-4 weeks.

Requisition Request (R Class) – Orders over \$5,000

Requisitions for orders in excess of \$5,000 (e.g. equipment, services require contract) need to go through UCLA Purchasing for approval. Certain products and services require special handling and must be ordered by requisition regardless of value; They include purchases of software, firearms, explosives, narcotics and radioactive materials. A UCLA professional buyer's signature is required on all contracts and licenses, including service and maintenance not covered by established agreements.

Requisitions can take up to 3-4 weeks to be processed by Central Purchasing. To avoid delay, plan ahead and submit the requisition request at least a month before you need the equipment. Please avoid receiving equipment/items prior to getting the approval of the P class purchase order from Central Purchasing to avoid after the fact justification.

Submit the following forms below to ceehelp@seas.ucla.edu for orders over \$5,000.

- **Purchase Order Form** - <https://www.cee.ucla.edu/purchaseorders/>

- **Sole Source Form** = <https://www.ucop.edu/procurement-services/policies-forms/federal-funds-files/source-selection-price-reason-form-9-24-2019.pdf>
For federally-funded purchases greater than or equal to \$10K and non-federally funded purchases greater than or equal to \$100K, a Source Selection Price Reasonableness Form must be completed and submitted with PO request form.
- **Vendor Quotes** - At least 2-3 quotes from vendors should be obtained and provided with the rest of the form so we can attached it to the requisition order request submitted to purchasing.
- **(For Software and Equipment that require software/ web apps) SNOW Triage Form** - <https://www.cee.ucla.edu/wp-content/uploads/cee/UCLA-OCISO-TPRM-Triage-Form.xlsx>
For software not available through Software Central, and equipment that require software/ web applications to use.

B. DEPARTMENT PURCHASING CARD (Pcard)

The department purchase card should be used if a vendor does not accept UCLA PO or is not set up as a vendor in the UCLA Bruinbuy system. UCLA has contracted rates with many vendors so we should go through the contracted pricing first before finding other vendor options and purchasing items through Pcard. Please look for preferred vendors when ordering your supplies.

If you are purchasing from a vendor that is not set up in the UCLA Bruinbuy system and do not plan to purchase from them in the future, the department Pcard can be used to pay for these purchases. Please submit and Purchase Order form and send it to ceehelp@seas.ucla.edu to place the order.

Please note that Pcard purchases have a single transaction limit of \$2,500 and a daily limit of \$5,000.

C. PAY OUT OF POCKET & GET REIMBURSED

This method should be the last resort if you cannot use PO or Pcard for payment. We want to minimize the reimbursement process especially reimbursements over \$1,000 which requires approval from Central Purchasing.

Reimbursements for non-travel, non-entertainment and non-communication related expenses are exceptions to our normal procurement methods, and subsequently may take longer to process. Refer to the Section V Restriction of [UCLA Policy 740](#) for additional information. Services should never be paid for by university employees out of pocket.

Goods should be purchased using the university approved procurement methods and should only be purchased with personal funds as a last resort. If you need to purchase goods, please contact the department staff (ceehelp@seas.ucla.edu) for options - use of PO or Pcard before paying out of pocket to avoid delay in reimbursements which can take up to **3 months**.

Use of employees' personal funds and reimbursements for procurement of goods and services is discouraged. With the release of this new LVO Policy 741, a \$500 limit has been established for reimbursements of purchases other than travel, entertainment, conference registrations, tuition reimbursement, and maintaining professional credentials (i.e. licenses). The \$500 limit is per item not per transaction but the goal is to also reduce the number of transactions that go through as reimbursements. The limit excludes tax and shipping but again the goal is to steer more purchases to approved methods. All reimbursements over \$1,000 require an exception request to be approved by the Associate Director of Purchasing, which means the processing time is longer than the estimated 3 months.

If you have contacted the department staff for purchasing options and we cannot use the PO or Pcard to place your order and we advised you to pay out of pocket and get reimbursed, then please submit the forms below to ceehelp@seas.ucla.edu to request reimbursement.

- **Reimbursement Request Form:**
<https://www.cee.ucla.edu/reimbursement-requests/>
- **Receipts**
- **Proof of payment** - If receipt does not show last four digits of credit card number, please provide redacted credit card or bank statements.