



PURCHASING AT PENN

Purchasing and related payment transactions are initiated by the finance team at the department level and then processed centrally by PENN.

Everyone who authorizes the expenditure of University funds for any purpose must confirm that the expenditures are:

- Reasonable and necessary
- Consistent with established University policies and practices
- Applicable to the work of the University, including instruction, research and public service
- Consistent with sponsor or donor expenditures restrictions

Contracts:

Unless authority has been granted to an individual by the Trustees, **only the Purchasing Services Department has the authority** to enter into a purchase agreement or otherwise obligate the University.

RESOURCES

Looking for a Vendor: [UPENN Supplier List](#) or [Penn Marketplace](#)

Not sure what method to use for your purchase (i.e. PO, Credit Card, etc.): [UPENN Commodity Matrix](#). **Still unsure, please check with your Business Administrator/Financial Coordinator.**

APPROVAL LIMITS

Purchasing approval limits are set by the Business Office of your department to align with the current organizational structures, as well as to enhance empowerment, efficiency and effectiveness of the process. Please check with your Business office for what these levels are.

BUYERS RESPONSIBILITIES

In order to facilitate timely and accurate procurement, please adhere to the steps below:

- 1) Determine whether or not the vendor is a UPENN Supplier (see resource section to the left)
Note: If not a current UPENN supplier and the vendor is an individual or non-corporate entity, a Service Provider Questionnaire and Service Provider Evaluation Worksheet must be completed and reviewed prior to engaging in activity with the service provider. See [Service Provider Classification](#) for forms.
- 2) Determine what method of purchase is allowable for the purchase (see resource section to your left)

If purchasing method is determined to be a PO:

- If vendor is in [Penn Marketplace](#), shop Penn Marketplace and assign cart to your finance department.
- If vendor does not reside in Penn Marketplace but is a PO vendor, provide the following to your business office: requestor name (your name), approval by supervisor and departmental director, full name, address, vendor Contact name, E-mail address and phone number of the vendor, 26 digit BEN code, quote from vendor.

*Note: A minimum of three formal written quotes are required for orders with an aggregate total cost of \$5,000. **Exceptions** to the competitive bidding requirement are limited to purchases from University **preferred contract suppliers**.*

If purchasing method is determined to be the Purchasing Card:

- Ensure that the vendor is NOT in the Penn Marketplace
- Provide the following to your business office: requestor name (your name), approval by supervisor and departmental director, full name, address and phone number of the vendor, need by date, 26 digit BEN code, quote/invoice from vendor.
- Upon receipt of goods, submit packing slip to the finance department to confirm receipt.

If the purchasing method is determined to be a Non-PO vendor:

- Provide the following to your business office: requestor name (your name), approval by supervisor and departmental director, full name, address, vendor Contact name, E-mail address and phone number of the vendor, 26 digit BEN code, quote from vendor.

Note: If new vendor, please also send Completed Service Provider Forms noted above to your Business Office during vendor set-up, if applicable.