



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 Officer.**

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.

Additional Questions: Contact your Business Office

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 resources 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 resources 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, please go to your department's transaction request form for an outline of information needed to move your request forward.

*Note: A minimum of three formal written quotes are required for orders with an aggregate total cost of \$10,000. **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. If a PO vendor, then a PO is needed to move forward with the purchase
- Please go to your department's transaction request form for an outline of information needed to move your request forward.
- Upon receipt of goods, submit packing slip to the finance department to confirm receipt.

Note: If you are a card holder, you are required to abide by the [cardholder's responsibilities](#), especially the entering of business purpose and budget code in PaymentNet weekly and submission of receipts and monthly statements to your business office at month's end. If standards are not followed, your card will be closed.

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

- Please go to your department's transaction request form for an outline of information needed to move your request forward.