

## IFAR Staff Instructions for Opening a Purchase Order

### 10.1.17

In order to centralize the process and minimize errors with account numbers, budgets, and timing of grants, all Purchase Requisitions will be submitted through Research Administration.

Purchasing will only accept Purchase Requisitions from the email

[researchadmin@hsl.harvard.edu](mailto:researchadmin@hsl.harvard.edu). In case of absence, only another member of Research Administration may submit the Purchase Requisition. A PO may only be opened if submitted by Research Administration and will be returned to the requestor if otherwise.

#### **The steps of opening a PO are as follows:**

- 1) The staff member will contact Purchasing to obtain a quote and product number via email to [beauchemin@hsl.harvard.edu](mailto:beauchemin@hsl.harvard.edu) or [Neyhus@hsl.harvard.edu](mailto:Neyhus@hsl.harvard.edu)
  - a. The staff member may acquire the quote directly from the vendor, so long as they are approved in adherence with the IFAR Purchasing Policy, if:
    - Purchasing cannot provide a product/quote through an existing vendor
    - A specific vendor is needed for specialized research materials
- 2) The staff member will complete the Purchase Request form and acquire all required signature adherence with the IFAR Purchasing Policy
  - a. Authorized account signatory
  - b. Grant Manager
  - c. For Purchase Orders over \$2,000 the Vice President of Research Administration
- 3) The staff member will email the purchase requisition form with quote in PDF format (must be a single PDF per submission, one PDF per email) to [researchadministration@hsl.harvard.edu](mailto:researchadministration@hsl.harvard.edu)  
If using a new vendor, the staff member will also complete and attach the New Vendor form
- 4) The Grant Associate will review for account number, accuracy and signatures
  - \*Purchase Requests do not require review via email prior to signature. If upon receipt for submission there are any discrepancies or errors, Research Administration will contact the submitter for clarification
- 5) The Grant Associate will submit the purchase request via the Research Administration email address ([researchadmin@hsl.harvard.edu](mailto:researchadmin@hsl.harvard.edu)) and copy the initiating staff member.
- 6) Purchasing will send a copy of the PO to the vendor to initiate the order
  - \*In some special instances, the staff member will place the order directly with the vendor. Purchasing will send the PO directly to the staff member in this instance.
- 7) The staff member will inform purchasing and copy [researchadmin@hsl.harvard.edu](mailto:researchadmin@hsl.harvard.edu) when their order has been received and instruct them to close the PO.
- 8) The vendor will submit invoices for payment to via email to [researchadmin@hsl.harvard.edu](mailto:researchadmin@hsl.harvard.edu) in order to pay the PO and complete the process.