



Marcus Institute Staff Instructions for Opening a Purchase Order

10-1-2020

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 and IT will only accept Purchase Requisitions from the email researchadmin@hsl.harvard.edu. In case of absence, only another members 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 for hardware and software via IT are as follows:

- 1) The Marcus staff member will contact IT to obtain a quote and product number via email to helpdesk@hsl.harvard.edu. Staff member will note the ticket number and reference the help desk ticket number for future reference.
- 2) The staff member will complete the Purchase Request form and obtain all required signatures in adherence with the Marcus 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 researchadmin@hsl.harvard.edu and will include the original ticket number.
If using a new vendor, the staff member will also complete and attach the New Vendor form
- 4) The Grant Assistant 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 Assistant will submit the purchase request to IT, referencing the original ticket number (if hardware or software) via the Research Administration email address (researchadmin@hsl.harvard.edu) and copy the initiating staff member.
- 6) IT (if hardware or software) will send a copy of the PO to the vendor to initiate the order.
- 7) The vendor delivers the product to the IT department.
- 8) IT will notify the staff member with a cc to researchadmin@hsl.harvard.edu when the product has been received and IT delivers product to Marcus staff
- 9) IT submits final invoice to HSL AP to pay and close out the PO, with a cc to researchadmin@hsl.harvard.edu
- 10) Grant Assistant will reconcile POs to ensure closed in a timely manner on a monthly basis



The steps of opening a PO for all other equipment or purchases requiring a PO are as follows:

- 1) The Marcus staff member will contact Purchasing to obtain a quote and product number via email to 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 Marcus 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 obtain all required signatures in adherence with the Marcus 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
If using a new vendor, the staff member will also complete and attach the New Vendor form
- 4) The Grant Assistant 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 Assistant will submit the purchase request to purchasing via the Research Administration email address (researchadmin@hsl.harvard.edu) and copy the initiating staff member.
- 6) Purchasing will send a copy of the PO to the staff member who will send to vendor to initiate the order.
- 7) The vendor delivers the product to the Marcus Institute staff
- 8) The vendor should submit the final invoice to the staff making the order and researchadmin@hsl.harvard.edu
- 9) Once the Marcus staff is satisfied with the order, they forward the final invoice to purchasing (Neyhus@hsl.harvard.edu) with a cc to researchadmin@hsl.harvard.edu in order to close the PO and process payment, completing the process. Employee should ensure their contact information is on the purchase request form to receive the invoice.
- 10) Grant Assistant will reconcile POs to ensure closed in a timely manner on a monthly basis