

Purchasing procedure when using Physics-lab funds. Its purpose is keeping expenses within budget. If you are purchasing from the instrument room, please see note below. If you are planing to pay upfront and get reimbursed, see *warning* below.

- step 1)** A quote should be obtained; if a quote cannot be obtained, then at the minimum a price listing must be obtained. The quote or price listing is sent to the lab manager for approval.
- step 2)** It is determined whether there are sufficient funds to make the purchase and the final quote is sent to the person placing the order.
- step 3)** Using the final quote or price listing, the order is placed. This must be done according to the NMT Purchasing Policies. Note that if you are not using a provider already on record with NMT, some delays and paperwork could be required. Plan ahead, as delays could be substantial (anywhere from a few days to months) just to know if the order can be placed.
- step 4)** When the purchase shows up in the statement generated by Purchasing office, it must be checked for discrepancies between the actual charge and the quoted amount. Discrepancies noted at this step are brought to the attention of the lab manager and/or chair of the department.
- step 5)** Once the statement has been accepted (signed), a copy of the actual invoice should be requested from Purchasing to keep in our records.

**Who does what:**

- step 1)** the person requesting the purchase of the items.
- step 2)** the lab manager
- step 3)** the secretary (NMT-card holder).
- step 4)** the secretary (person placing the order).
- step 5)** the secretary requests the final invoice/receipt from Purchasing and sends it to the lab manager, who updates the records for the lab account.

**Instrument Room:** Occasional purchases required for the operation of the labs can be done without prior authorization. The total amount of the purchase still needs to be reported to the lab manager (a line item list is not required, as it can be obtained from the instrument room). If the purchase is for more than \$200, please check for availability of funds with the lab manager. Note that if the lab account is running low, authorization may be required for any purchase.

**Reimbursement warning:** Before any purchase, check for sufficient funds with the lab manager. Purchases using your own funds can be reimbursed, but keep in mind that NMT is a tax exempt institution and therefore *will not* reimburse you for taxes incurred in the transaction. Also, you must be able to produce a valid receipt for any expenses for which you want to be reimbursed. For any questions review the Purchasing Policies.