

Purchasing Instructions

Need to Know

It is important to obtain pre-approval from the NRS Campus Office before making a purchase. The office can verify any restrictions or requirements for your purchase.

Purchases can be made using on and off campus sources. Campus has strategic sources that offer UCSB departments discounted prices (i.e. Office Depot, Fisher Scientific, etc.).

When requesting pre-approval for a purchase, you will need to provide the cost center/project code that you want to use. In order to substantiate a purchase, the campus requires the following documents:

1. Order Confirmation
2. Packing Slip - signed and dated by the receiver
3. Invoice or receipt - signed by the receiver if no packing slip

Purchase Orders

Purchase Orders may be obtained for the purchase of supplies, materials, services and repairs. Services and repairs to be performed on Reserve property or involving the transport of Reserve property of any price will require a PO and possibly a contract with the vendor.

If an employee other than the Reserve Director is requesting a PO via email, the Reserve Director must be copied on the email or other RD approval must be obtained.

For purchases of supplies/materials/equipment, it could take 1-2 weeks for approval. For purchases of services, it may take longer in order to obtain Proof of Insurance from the vendor. A copy of the PO will be sent to the RD and the vendor once it's complete.

When requesting a PO from the campus office, please provide the following information:

1. Vendor Name
2. A quote or estimate from the vendor for the work to be performed or supplies being purchased
3. Cost Center/Project Code to be used

Vendor Blanket Agreement

A vendor blanket (VB) is a type of purchase order that allows for multiple use. Under a VB agreement with a particular vendor, Reserve staff can continually make purchases from that vendor using the same VB# each time, without having to contact the NRS office for a new PO. This is appropriate in you are using a vendor on a weekly or monthly basis.

Some circumstances when one might want to set up a VB:

1. Monthly recurring charges (garbage services, water delivery, cell phones, etc.)
2. Frequently used vendors (hardware, auto parts, copy services, lumber, etc.)
3. Infrequently used vendors that require Proof of Insurance (equipment rentals)

Business Services Agreement/Contract

For more information about contracts, please contact [Deby Puro](#).

FlexCard

FlexCards can be a very fast and convenient way to purchase goods and services; however, having a FlexCard does come with some responsibilities. A FlexCard is a VISA credit card, issued in the name of the employee, which can be used just like any other credit card to make most purchases of supplies and services.

See the [FlexCard Commodities List](#) for restricted items.

Note: Purchases can only be made by the cardholder whose name appears on the card. Cards cannot be shared.

See the [FlexCard Procedure](#) for more information.

Reimbursement

Campus prefers one of the above methods be used for purchases. Purchases made using personal funds should be pre-approved in order to ensure they're reimbursable. Original receipts are required for reimbursement and must be submitted to the NRS Campus Office within 60 days of the transaction date. Please sign all receipts to verify that the product/service was received and fill in the [NRS Reimbursement Worksheet – MISCELLANEOUS](#) for supplies, etc. and the [NRS Reimbursement Worksheet – ENTERTAINMENT](#) for food, drink, etc.

See [Reimbursement Instructions](#) for more information.