

Purchase Order Request Procedure School of Social Work

Background

A Purchase Order must be obtained PRIOR to any services being conducted or purchased. Purchase Orders (POs) are needed for:

- Purchases of items or services \$5,000 or more
- Purchase of commodities unallowable on a P-Card (services, room rental, professional/artistic services, etc.)
- When a vendor will not accept a P-Card
- Any purchase requiring a signature
- Any purchase that has terms and conditions other than the University standard

Requesting a Purchase Order

- 1) Email the business office (sw-expenses@illinois.edu) with the name and contact information of the vendor you want to use.
 - If the vendor is not in Banner, the vendor must complete a form so a vendor number can be assigned. **This process can take up to 2 weeks.** Then move to number 2.
 - 2) Once the vendor is in Banner, send the following to sw-expenses@illinois.edu:
 - quote from the vendor for the goods or services
 - a detailed description of the business purpose of the purchase, and how it relates to your grant (if applicable)
 - The fund to charge
 - 3) The business office will process the purchase order. **Allow up to 2 weeks for campus to complete the transaction.**
 - 4) The vendor will be asked to supply a complete invoice for payment:
 - Vendor name
 - Vendor remittance address
 - Unique invoice number
 - Invoice date
 - Invoice total
 - Description of goods and services
 - Detailed/itemized pricing information (quantity and unit pricing)
- No highlighting or red text should be used. Missing information can delay payment.

Remember: No services should be performed or goods should be shipped until the PO number has been obtained!

Questions?: Contact sw-expenses@illinois.edu