

Purchasing Guidelines

Generally speaking, methods for buying and paying for goods at BEAM are as follows: 1) AmazonBusiness & SmartMart 2) Purchasing Card (PCard) 3) Reimbursement and 4) Invoice Payment. Always ask your supervisor's approval before you make any purchases. We encourage you to take advantage of Stanford-negotiated prices by purchasing through Stanford's AmazonBusiness and SmartMart.

AmazonBusiness and SmartMart

AmazonBusiness and SmartMart are the preferred purchasing methods. They provide a fast, efficient online source for searching and purchasing. They integrate multiple supplier catalogs into one robust online shopping experience. They offer us a wide breadth of products and services, from office supplies to books, computers, furniture, groceries, snacks and catering, etc. In order for Dietra to place the order for you, you will be asked to fill out the details on a log sheet. It usually takes a couple of days for goods to be delivered after we place the order. In general, Dietra places an order once a week except for some urgent needs, so plan your request accordingly. During the pandemic, because the system is designated to ship all goods to our office, we cannot use this way of purchasing. Instead, we use the Purchasing Card, which delivers the order to your desired location. If you need to purchase something, please talk to Betsy or Jing Jing to get the credit card information.

Purchasing Card

There is a Purchasing Card (PCard) for each unit, so use your unit's PCard to purchase your items as often as possible. For some circumstances, the unit PCard is not available. You can then use the department PCard which is used for general BEAM purchases. When using this, it doesn't affect which PTA will be charged. If you are a card holder, you should not lend or share your card. You must keep your card secure and the card number confidential.

Usually you can go to the front desk to obtain a PCard. There, you will be asked to fill out the details on a log sheet. When you are done, return the Purchasing Card and submit receipts to Dietra. On the back of the receipt, always write your name and the purpose for the purchase. In addition, if the purchase is not for your unit, you need to specify which unit will pay for this. For refreshments, you need to provide the following information: who, what, when, where and why. The number of the attendees is mandatory. If your order amount exceeds \$500 (including sales tax & shipping), it is your responsibility to ensure reasonable pricing. Compare pricing using online catalogues or website searches and solicit 3 competitive bids. Attach all the supporting documents to your requisition to acknowledge compliance with the price reasonableness policy for auditing purposes.

The Purchasing Card may not be kept overnight. You cannot use the card to purchase any items over \$4,999.99 (including sales tax & shipping). Keep in mind that the Purchasing Card cannot be used for the following purposes:

1. Personal expenses
2. Fabrications
3. Hazardous materials
4. Travel
5. Student conference registration
6. Cash advances

Direct Deposit Reimbursement

Petty Cash is discouraged to be used by the Central Office, so it is no longer available for you to be reimbursed by using Petty Cash. Submit receipts to Dietra to be processed for a direct deposit reimbursement which is separated from your paycheck deposit. Usually, direct deposit reimbursement takes 1-2 weeks to be processed by the Central Office. Sometimes it takes longer than 2 weeks, so be prepared for the lengthy process. You are responsible for providing an original receipt showing proof of payment with the request for reimbursement. Keep every single receipt for reimbursement; missing receipts will not be able to be processed. Write down your name and the purpose of the payment on each receipt. Expenses submitted more than 60 days after they are incurred will be reported as additional income to the individual, in accordance with Internal Revenue Service guidance.

Invoice Payment

Some vendors do not accept credit card payments; they only take checks by paying invoices. When you have an invoice that needs to be paid, give it to Dietra to be processed. If the invoice is for any maintenance or service agreement/contract, give it to Jing Jing. It usually takes 7 to 10 working days to complete the process after the preparer originates the request. However, if the vendor is new, the Financial Support Center needs to set up the new vendor profile in the Oracle system, so it takes much longer for the vendor to get paid. Keep this in mind when you talk to the vendor, so that you can avoid the additional \$35 expediting process fee. For agreements/contracts, the Procurement Contracts Team takes a turnaround time approximately 21 business days from the time the requisition is fully approved. No one from our department can sign a service agreement/contract; it needs to be signed by the Procurement department.

According to our transaction data, the most commonly billed three items at BEAM that need to be addressed specifically are business meals, gifts, and event activities.

Business Meals

Business meals should be necessary and reasonable. PCard is the most efficient & effective way to pay for meals. Tips for meals cannot exceed 20% of the cost. Any alcoholic items should always be highlighted on the receipt and separated from regular meal expenses. When you turn in your receipt, provide the following information on the back of your receipt to answer the following questions: who, where, when, why and what. If you want to take someone to the Faculty Club for lunch, Dietra will make a reservation for you. If for some reason you need to pay for it yourself, you must submit your receipts within 10 days of incurring expense to be reimbursed. Our suggested guidance on meal costs is no more than \$25 for breakfast, \$40 for lunch & no more than \$80 for dinner which includes tax and tips.

Gifts

We are permitted to give gifts to guest speakers, panelists, and students as a token of appreciation when appropriate. However, we highly recommend that you use BEAM swags instead of buying gift cards. Gifts in excess of \$50 are tax reportable. The recipients need to provide their Social Security Number for tax purposes; however, usually people prefer not to do this. To ensure gifts are nontaxable to the recipient, we need to follow the IRS regulations: the aggregate gift value should not exceed \$50 per individual annually. The gift card must be of the type that requires the recipient to exchange the certificate for tangible personal property (i.e., no MasterCard, Visa or AMEX gift cards). Gift cards to be

given to students require submission of the student's name, SUID, and gift card dollar amount, all of which must be provided as backup to the purchase transaction. Pre-approval is required at the AVP level.

Event Activities

For events/programs that are financially coordinated with other departments, notify Jing Jing of the name of your program and what the BEAM proportion of cost is. Usually, the department that needs to pay another department on campus for sharing the expense initiates the online expense transfer. In order to make the transfer, you need to submit all the receipts, provide the PTA that the transfer will go to, and name the financial contact person to add to the routing list to be notified or approved. In the event of food and refreshments for your event/program, it is mandatory to provide the name of your event/program, the location, the date, and the number of attendees. Furthermore, if the catering vendor needs a signature for the catering agreement, no one from our department can sign; it needs to be signed by the Procurement.