

## Purchasing Workflow

Contact Financial Specialist Gloria Brown for assistance with: purchasing; purchase orders; requisitions; payment to non-employees and vendors; and MDS requests. Staff with purchasing cards may skip steps and continue to purchase themselves.

- 1) Contact the Financial Specialist and provide the following:
  - a. description of item and cost (it would be helpful to have a quote, web link, or preferred vendor if possible);
  - b. fund for payment; and
  - c. shipping address.
  
- 2) When purchasing on discretionary accounts such as departmental funds, start-ups, CapEx, WARF awards, Vilas Professorships and similar non-sponsored projects, the Financial Specialist will verify the purchase is compliant with UW purchasing policies and that adequate funding is available. The Financial Specialist will then process the order per UW requirements.
  
- 3) When purchasing on sponsored projects such as 133 or 144 accounts, the Financial Specialist will verify the purchase is compliant with UW purchasing policies. The Financial Specialist will then contact the appropriate Program Manager to verify:
  - a. adequate funding;
  - b. allowability of purchase; and
  - c. allocability under the terms of the sponsored project.The Program Manager will then provide account numbers to the Financial Specialist.
  
- 4) The Financial Specialist will process requests within two business days after all preceding steps are complete and will email notification that the item has been ordered.
  
- 5) Staff and students who are purchasing for someone else's project should start the purchasing process by seeking authorization from the PI or project administrative staff.