

Purchasing

1. Funds

Each student has \$75 for the remainder of the class for all purchases of labs and project.

Track your own funds. You are expected to know your allocation as you make purchases.

3. Home delivery

If you are seeking delivery to a home address, specify the address using the following example format. You need to include your home phone number as some deliveries require this.

PH: 215-123-4567
5413 Franklin Dr. Apt #302
Philadelphia, PA 19130

In your purchase request you should include a statement of justification for home delivery see email wording below.

4. Purchasing decision chart

Transaction type	Purchase execution time	Purchase request submission procedure and additional details
Order via Purchasing	1-5 business days	Email purchase request sheet to yim@seas.upenn.edu Funds directly drawn from student funds held with PEFS
Urgent order via Purchasing	Several business hours	Email purchase request sheet to yim@seas.upenn.edu Funds directly drawn from student funds held with PEFS
Concur reimbursements	Several business hours	Email request for pre-purchase approval or post-purchase approval to yim@seas.upenn.edu Submit reimbursement request within 10 business days of purchase Reimbursement typically disbursed within 1 - 4 weeks of reimbursement approval Services and US taxes not reimbursed;

5. Ordering through the Purchasing department

You are encouraged to purchase using the Purchasing department in lieu of out-of-pocket purchases. Currently, most orders submitted to Purchasing clear within several to 1-5 business days. Urgent orders usually clear within 1-5 business hours.

The department can ship to personal residences or the university and has access to free or low-cost shipping for McMaster, Digikey, and Amazon Prime.

The workflow when using PEFS Purchasing is as follows.

- 1) Check that product is in stock/available.
- 2) Fill out the Purchase Order Request Form. Ensure all information on the form is accurate and complete.
- 3) Email yim@seas.upenn.edu for approval with the Purchase Order Request Form attached in pdf format. Make sure you follow the specific Purchase Order Request Form and email instructions outlined below.
- 4) Yim forwards the Purchase Order Request Form with approval to PEFS Purchasing. The student or team is copied on the email.

5.1 Purchase Order Request Form

All Purchasing requests must be accompanied by a pdf copy of a Purchase Order Request Form. All information on the Purchase Order Request Form should be filled out. You must submit a separate Purchase Order Request Form (and associated purchase request email) for each supplier.

Importantly, the “Name”, “Phone number”, and “Email address” provided on the Purchase Order Request Form should correspond to the package recipient..

The following are examples of a Purchase Order Request Form for an [Amazon purchase request](#), a [McMaster purchase request](#) (including additional specification of product details that need to be entered at the time of purchase, shown in bold).

The Purchase Order Request Form filename should have the format "PURCHREQ_<YearMonthDay>_<Student last name>_MEAM510_<Supplier>_<Informative suffix>". For example, "PURCHREQ_20201012_Smith_MEAM510_Amazon_Hydraulics".

5.2 Purchase request email

Email yim@seas.upenn.edu with your purchase request. Do not include purchasing@seas.upenn.edu on this email or your supplies may be ordered twice. Only one Purchase Order Request for one vendor per email.

Attach your Purchase Order Request Form to the email.

The subject line of the email should mirror the filename of the purchase Purchase Order Request Form.

The body of the email should indicate the "Total purchase request amount" and the "Remaining PEFS budget after proposed purchase". Shipments to personal residences must include a justification. **Copy the example justification shown below exactly.** An example email follows.

Subject: PEFS-POF PURCHREQ_20201012_Smith_MEAM510_Amazon_Hydraulics

Professor,

Would you approve the attached purchase request from me for Amazon and forward the request to Purchasing?

We are requesting home delivery. Due to Covid classes are online and projects are being completed off campus.

Total purchase request amount: \$33.65

Remaining PEFS budget after proposed purchase: \$10.42

Thank you,
John Smith,

5.3 Urgent purchase requests

Urgent purchase requests typically clear within several business hours and can be used if time is of the essence (e.g. product might sell out) or if Purchasing lead times are unsuitably long. To indicate an urgent purchase request, add "*URGENT*" to the beginning of the purchase request email subject line as shown in the following example.

Subject: *URGENT* PEFS-POF
PURCHREQ_20201012_Smith_MEAM510_Amazon_Hydraulics

5.4 Instructor approval and completion of the purchase

The instructor will approve the purchase as long as the request does not violate university protocols (e.g. health and safety, prohibited products or services) and the supplies are project-related. The instructor will forward the purchase request and approval to purchasing@seas.upenn.edu and copy all persons included on the original purchase request email.

Purchasing will email all parties on the instructor's approval email after completion of the purchase. This purchase confirmation will contain a purchase order (PO) number, Amazon purchase confirmation number, or similar. These identifying numbers should be referenced if follow-up communication with Purchasing or the instructor is necessary.

5.5 Cancelling an order

Reply all to your purchase request email with a statement similar to "Please do not approve this order - we are cancelling the order" if the instructor has not yet approved/forwarded the order to Purchasing.

Reply all to the instructor's approval email (make sure purchasing@seas.upenn.edu is included) if the order was approved and forwarded to Purchasing but has not been completed.

Reply all to the purchase confirmation email from Purchasing if Purchasing has already executed the order. In some cases, a recent order can be cancelled without penalty. Other cases may be more unique and require some back-and-forth communication with Purchasing and, possibly, non-refundable re-stocking or handling fees.

5.6 Tracking an order

You may have need to verify that an order was correctly executed or obtain a tracking number. You are encouraged to verify and track purchases for high-ticket items, important supplies, or supplies that are needed quickly.

Tracking numbers and delivery status for some vendors (e.g. Amazon and eBay) should be obtained by inquiring via reply all to the purchase confirmation email you received from Purchasing. For such purchases, the purchase confirmation email from Purchasing will indicate "Information regarding delivery status should be requested by emailing purchasing@seas.upenn.edu" or equivalent.

The purchase confirmation email from Purchasing for other vendors will indicate "Information regarding delivery status should be requested directly from the vendor" or equivalent. In such cases, you should directly contact the vendor with the PO number (or equivalent) that was provided in the purchase confirmation email to determine fulfillment status or obtain a tracking number.

6. Reimbursements for out-of-pocket expenses via Concur

Purchasing uses Concur to process reimbursements for out-of-pocket expenses. Concur reimbursements must be submitted within 10 business days of the purchase. Submissions beyond that deadline will not be approved.

You are encouraged to purchase through the Purchasing department so that you are not outlaying personal funds. It usually takes 1 - 4 weeks for funds to be disbursed after a Concur reimbursement has been submitted and approved.

Most product purchases that provide a legitimate record of the transaction can be reimbursed. Services (e.g. photographer fees, paying a local welder) cannot be reimbursed. Ask before the purchase if you have questions. Unique scenarios can sometimes be accommodated. Message the instructor before booking travel if seeking reimbursement.

US taxes are not reimbursed, but foreign taxes and taxes associated with travel are. The following PA State and use tax no. may be used to remove tax burden in some US States and with some companies: 75-532-357.

Shipping is reimbursed.

The workflow when purchasing out-of-pocket is as follows. You may seek pre-purchase approval or post-purchase approval.

- 1) If seeking pre-purchase approval, email yim@seas.upenn.edu following the instructions in [6.1 Pre-purchase reimbursement approval email](#). Purchases from multiple suppliers can be clubbed if the purchases occur on the same day.
- 2) Purchase the supplies.
- 3) Fill out the Concur reimbursement report following the instruction in [6.3 Concur reimbursement report submission](#).
- 4) If seeking post-purchase approval, email a copy of the Concur report to yim@seas.upenn.edu following the instructions in [6.2 Post-purchase reimbursement approval email](#).
- 5) Submit the Concur report.

6.1 Pre-purchase reimbursement approval email

You are encouraged to email yim@seas.upenn.edu in advance of your purchase to obtain pre-approval for the out-of-pocket expense; especially if you anticipate that the supplies might represent a health or human safety hazard. The email should have the following form.

Subject: ReimbursementPreapprovalRequest
PURCHREQ_20201012_Smith_MEAM510_Amazon_Hydraulics

Hello Professor,

Would you pre-approve reimbursement via Concur for the following supplies to be used for my MEAM 510 purchase from Amazon for Hydraulics.

Item 1: #4-40 x 1/2" Flat Head Socket Cap Screws, Fully Machine Threaded, Bright Finish, Hex Drive, 304 Stainless Steel 18-8, 100 PCS by Eastlo Fastener
<https://www.amazon.com/Socket-Machine-Threaded-Stainless-Fastener/dp/B08FYB6TRT>
Item cost: \$6.99

Item 2: Roller Chain, Single Strand, ANSI Number 35, 3/8" Pitch, 9 ft length
<https://www.mcmaster.com/6261K172/>
Item cost + taxes: \$35.10
Estimated shipping cost: \$10.50

Total purchase request amount: \$52.59

Remaining PEFS budget after proposed purchase: \$10.00

Thank you,
John Smith

It is important that you include the vendors and a descriptive suffix in your subject line, identify your budget number in the body of the email, accurately identify all supplies you will purchase in the body of the email, report the total purchase request amount, report your remaining PEFS budget, and sign off with your legal name.

Alternatively, you may attach a spreadsheet in the likeness of the [5.1 Purchase Order Request Form](#) instead of describing the supplies inline in the body of the email.

The instructor will approve the purchase as long as the request does not violate university protocols (e.g. health and safety, prohibited products or services) and the supplies are project-related.

You will need to attach the approval to your Concur reimbursement report.

6.2 Post-purchase reimbursement approval email

You may instead seek post-purchase reimbursement approval. Your email should take the following form and include a copy of the Concur report. The generation of this report is described in section 11 of [6.3 Concur reimbursement report submission](#).

Subject:
ReimbursementRequest_20201012_DanniMarcus_MEAM510;smith;McMasterAmzn;MEsupp

Hello Professor,

Would you approve reimbursement via Concur for the supplies described in the attached report named "MEAM510; smith;McMasterAmzn;MEsupp"? The supplies described were purchased out-of-pocket, for use in MEAM 510/446, and reimbursement will be expensed to budget code XXX-XXXX-X-XXXXXX-XXXX-XXXX-XXXX (smith).

Total purchase amount: \$52.59

Remaining PEFS budget after purchase: \$10.00

Thank you,
Danni Marcus

It is important that you include the Concur report name (in accordance with the instructions in section 5.C of [6.3 Concur reimbursement report submission](#)) in the subject line, identify the attached Concur report name in the email body, identify your budget number in the email body, report the total purchase amount in the email body, report your remaining PEFS budget in the email body, sign off with your legal name, and attach the Concur report.

The instructor will approve the reimbursement as long as the request does not violate university protocols (e.g. health and safety, prohibited products or services) and the supplies are project-related.

You will need to attach the email approval to your Concur reimbursement report.

6.3 Concur reimbursement report submission

Almost all product purchases fall under the category of "Research Supplies" when filling out the Concur formwork.

The following instructions describe report generation and submission.

- 1) Log into Penn's Concur reimbursement system using your PennKey and password via the following link: <https://cms.business-services.upenn.edu/penntavel/expense-report.html>.
- 2) Select the "Expense" tab at the top of the Concur landing page. If you do not have an "Expense" tab, email travel@seas.upenn.edu indicating your full name, need to submit an expense report through Concur, and your 8-digit Penn ID number.
- 3) Select the "Create New Report" button.
- 4) A new expense report interface should appear where you will indicate the report header information. Indicate the following details in the report header.
 - a) "Type of Travel/Reimbursement" should be listed as "4. Non-Travel Expense".
 - b) "Country Code" should be left blank.
 - c) "Report Name" should include the MEAM 510 course code, your name, the vendor, and a unique and identifiable suffix. For example "MEAM510;Smith;Amzn;MEsupp". Note that the report name is limited to 32 characters.
 - d) The "Report Date" should indicate the date on which you are filling out the report (today's date).
 - e) "Policy" should read "US Expense Policy".
 - f) The "Business Justification" should report the who, what, when, where, and why of the reimbursement. For example, you might indicate the following: "Purchase by Minnie Driver in support of MEAM 510 project; purchase was of a variety of mechanical supplies; purchase date of 11/20/2019; purchased from Amazon". Note that this field is not character limited.
 - g) "Report Key" should be left blank.
 - h) "School/Center" should read "(13) EAS".
 - i) "CNAC-ORG-BC-FUND - Funding Source" should be autofilled and read "(130-1306-1-000000) EAS-MECHANICAL ENG-Y-GENERAL UNRESTR". In certain cases (usually ISD students from other departments), the code will read differently. If that occurs, replace the erroneous code with the code provided here.
 - j) "Program" should read "(0000) NOT PROG REL".
 - k) "CREF" should read "(0000) UNDEFINED".
 - l) "Lawson AU-UPHS COA" should be left blank.
 - m) "Affiliation" should be autofilled and cannot be adjusted.
 - n) "Notes to Approver" can be left blank unless any unique statements regarding the purchase need to be declared.
 - o) "Trip Begin Date" should be left blank.
 - p) "Trip End Date" should be left blank.

- 5) Click the “Next” button on the lower right hand corner of the expense report header to continue through to the next screen.
- 6) This screen will query you for an expense type. Always select “.06 Other Research Supplies” for all MEAM 510 purchases.
- 7) After the previous selection, a “New Expense” interface will appear. Indicate the following details in the expense description.
 - a) “Expense Type” should read “Research Supplies”.
 - b) “Type of Travel/Reimbursement” should read “4. Non-Travel Expense”.
 - c) “Country Code” should be left blank.
 - d) “Transaction Date” should be the date of the purchase and as listed on the receipt.
 - e) “Business Justification” should be left blank.
 - f) The vendor name should be indicated in “Vendor Name” – e.g. Amazon.
 - g) “Payment Type” should be “Cash/Personal Credit Card”.
 - h) “Amount” should be the total listed on the receipt including taxes.
 - i) “Personal Expense (do not reimburse)” should remain unchecked.
 - j) “Lawson AU-UPHS COA” should be left blank.
 - k) “Comment” may be left blank unless clarifying information needs to be communicated.
- 8) While still in the “New Expense” interface is still open, attach a pdf copy of your receipt by selecting “Attach Receipt” in the lower right hand corner of the interface.
- 9) While still in the “New Expense” interface and if taxes were charged, select “Itemize” from the lower right hand corner of the interface. This will allow you to separate taxes (usually not reimbursed) from the total. Then do the following after the “New Itemization” interface has appeared to indicate the total non-reimbursable taxes.
 - a) Select “Non-Reimbursable” (available in subsection “10. Non-Reimbursable”), after which additional fields will appear.
 - b) “Type of Travel/Reimbursement” should read “4. Non-Travel Expense”.
 - c) “Country Code” should remain blank.
 - d) “Transaction Date” should be the date of the purchase and as listed on the receipt.
 - e) “Business Justification” should remain blank.
 - f) The vendor name should be indicated in “Vendor Name” – e.g. Amazon.
 - g) “City” should remain blank.
 - h) “Payment Type” should remain autofilled.
 - i) The total amount of taxes should be indicated in “Amount”.
 - j) “Personal Expense (do not reimburse)” should remain checked.
 - k) “Lawson AU-UPHS COA” should be left blank.
 - l) “Comment” should remain blank.
 - m) Select “Save” in the lower right hand corner of the interface and you should see reversion back to the “New Itemization” interface.
 - n) Next, indicate the reimbursable non-tax expenditure by choosing an “Expense Type” of “Research Supplies” (available in subsection “06. Other”).
 - o) “Type of Travel/Reimbursement” should read “4. Non-Travel Expense”.
 - p) “Country Code” should remain blank.
 - q) “Transaction Date” should be the date of the purchase and as listed on the receipt.
 - r) “Business Justification” should remain blank.
 - s) The vendor name should be indicated in “Vendor Name” – e.g. Amazon.
 - t) “City” should remain blank.
 - u) “Payment Type” should remain autofilled.
 - v) The total purchase amount less taxes should be indicated in “Amount”. Note that the “Total Amount”, currently “Itemized” amount, and “Remaining” amount of the expense report is indicated at the top of the “New Itemization” interface. Presuming taxes were itemized first, the “Remaining” amount should reflect the purchase amount less non-reimbursable taxes.
 - w) “Personal Expense (do not reimburse)” should remain unchecked.
 - x) “Lawson AU-UPHS COA” should be left blank.
 - y) “Comment” should remain blank.
 - z) Select “Save” in the lower right hand corner and the interface should revert back to the “New Expense” interface.
- 10) Generate a pdf copy of the report and send it to yim@seas.upenn.edu for approval (applicable if you are seeking post-purchase approval via [6.2 Post-purchase reimbursement approval email](#)).

- a) While still in the expense report interface, select “Print/Email” and “UPenn Detailed Report 1” from the ensuing dropdown. Save the generated pdf locally.
 - b) Email yim@seas.upenn.edu for expense report approval. The email should be constructed as indicated in [6.2 Post-purchase reimbursement approval email](#)
- 11) Attach the professor’s approval email to your expense report and submit the report.
- a) Re-enter the expense report through Concur.
 - b) With the appropriate expense report selected on the left-hand pane, select “Receipts” and then “Attach Receipt Images” from the ensuing dropdown. Attach the professor’s approval email as a pdf document.
 - c) Select the red “Submit Report” button.

You can check the expected deposit date of the funds by opening the report, selecting “Details”, and then “Report Payments” from the ensuing dropdown.