TABLE OF CONTENTS:

<table>
<thead>
<tr>
<th>Section</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computers/IT Equipment</td>
<td>Page 1</td>
</tr>
<tr>
<td>Supplies</td>
<td>Pages 2-3</td>
</tr>
<tr>
<td>Completing the Purchase Request Form</td>
<td>Pages 4-6</td>
</tr>
<tr>
<td>Airfare/PTA numbers</td>
<td>Page 7</td>
</tr>
<tr>
<td>Link to forms/Fam Med website</td>
<td>Page 8</td>
</tr>
</tbody>
</table>
ORDERING COMPUTERS/IT EQUIPMENT

1. Determine your needs by discussing your planned purchase with your PI and determining the FAU/funding source for the purchase.

2. Contact DGIT to create a ticket (or email dgitsupport@mednet.ucla.edu) in order to discuss your purchase, determine the best item for purchase, and obtain a quote.

3. Once a request is placed, a dedicated IT technician will review the order, obtain a quote from the appropriate vendor, and return that quote to you.

4. You should then create a Purchase Order Request Form, clarifying the FAU and business justification, along with any other required information, and obtain PI approval.

5. Attach the quote to your PO Request Form and submit everything to the Sr. Fund Manager (Chris Mullin) by putting it in his box.

6. He will review the request, and if it does not need to be returned for additional information, he will approve it and submit it to the Purchaser (Valencia Moody) for processing.

7. Valencia will then create the PO and communicate that PO to the vendor.

8. The item will be delivered to DGIT so that it can be verified and installed for you by their team.

Please allow at least 7-10 business days for this order to be placed. If you have an urgent request, please communicate that to DGIT the Sr. Fund Manager, and the Purchaser so that they can attempt to accommodate your request more swiftly.
ORDERING SUPPLIES

1. If you need a non-specific, general office supply and you do not need a large quantity (e.g. if you need a stapler, pens, paper, post-its, etc.), please check the department supply cabinet (the tall black cabinet by the door in the Oppenheimer Supply/Copier room). If you do not see the item you need, please speak to Valencia to make sure it can’t be found elsewhere in the supply room. (Note: not all of the supplies in the Supply/Copy Room are available to all staff, some items belong to a particular research group or PI, so coordinate with Valencia if you are unsure).

2. If you determine that the item(s) you need are not available in the supply cabinet, or if you need project-specific supplies, a specialty item, or large quantity of items, please discuss the purchase with your PI to approve the order and determine which FAU should be used for the purchase.

3. Then determine the supplier:
   a. UCLA has agreements with certain suppliers who regularly do business with the University, and therefore provide discounts, have established purchase protocols, and whose ordering systems are directly linked to our Purchase Order system (BruinBuy). We encourage you to purchase your items from these suppliers if possible. Click here for a full list of all active suppliers in the BruinBuy system: http://staff.purchasing.ucla.edu/Portal/app/bruinbuy/supplier-index-og.aspx.
      i. For general office supplies, we recommend Office Depot. Visit their website to browse their catalogue and find the item number(s) and cost: https://business.officedepot.com/. Username: UC LA BROWSE, Password: BROWSE44. (888-777-4044 Customer Service; Acct # 90240294)
      ii. Items purchased from active BruinBuy suppliers do not need to be called in/faxed separately. Just complete a Purchase Request Form (Step 4) and the item will be automatically ordered when Valencia creates the PO since these suppliers link their ordering system with our PO system.
   b. If you cannot find the item you need from one of these suppliers, Valencia will need to create a Purchase Order number for the order, and then that PO # will need to be communicated to the vendor separately.
      i. First confirm with the vendor that they accept Purchase Orders (ask them or go to http://staff.purchasing.ucla.edu/Portal/app/agreements/agreementsummary.aspx).
         1. IF YES AND THE VENDOR HAS DONE BUSINESS WITH UCLA BEFORE: Obtain the item number and cost (get a quote if necessary), as well as the vendor information (including their address, phone number/fax number to send in the order, etc.). Proceed to Step 4.
         2. IF YES, BUT THE VENDOR HAS NOT DONE BUSINESS WITH UCLA BEFORE: Please coordinate with Valencia. The vendor will need to be set up in our system, which could take several days. Direct the vendor to this website: https://www.purchasing.ucla.edu/accounts-payable/vendors-required-to-submit-w-9 so they can submit their W-9 and be set-up as
an approved UCLA vendor. Once Valencia has confirmed with you that the vendor has been set up, proceed to Step 4.

3. IF NO: Please coordinate with Valencia. We highly discourage the use of personal funds (cash/credit cards/etc.) to purchase items. Before making such a purchase, please discuss options with Valencia.

4. Once you have determined that the vendor is an active BruinBuy Supplier and accepts PO’s, and you have the order information (item #’s, cost, delivery information, vendor information, etc.), please complete the Purchase Request Form (see Completing the Purchase Request Form on Page 4 for more information).
   
   a. Be sure to clarify on the form whether or not the purchase order needs to be faxed/emailed to the vendor.
   
   b. Get PI approval on the Purchase Request Form.

5. Submit the completed Purchase Request Form and any relevant supporting documentation to the Sr. Fund Manager by either putting it in his box or emailing it to him (Chris Mullin; cmullin@mednet.ucla.edu).

6. Chris will review everything for accuracy and confirm that the FAU is correct and that the cost is allowable. If there are any issues, he will return it to you for correction. Once approved, he will then forward the request to the Purchaser (Valencia Moody, vmoody@mednet.ucla.edu).

7. Valencia will create the PO. If you requested that the PO be submitted to the vendor, she will either email or fax (depending on the option you identified on the Purchase Request Form) the PO to the vendor.

8. If you have any questions about the status of your order after you’ve placed your order, contact Valencia.

NOTE: After the PO has been created, do not alter your order with the vendor without first discussing it with the Purchaser (Valencia). There may be restrictions on your order; also any changes to the order will require changes to the PO, which only Valencia can process.
COMPLETING THE PURCHASE REQUEST FORM

Department of Family Medicine
Purchase Request (PAC Order Form)

Enter the information for the person completing the form and the date the form was completed

If the PI permits it, the typed name or electronic signature of the PI is acceptable. Just be sure the PI has approved the request.

Justification:

This section is of utmost importance. Justifications must be specific and detailed. When in doubt, imagine you are being audited, and this is your chance to explain why the purchase is justifiable and relevant to the fund from which it is being paid. Expand the box if you need more space.

For invoices, you will need to attach the ORIGINAL invoice, and summarize the basic information on this request form in the table provided (invoice number, vendor, invoice date, short description, and total amount due). You can include more than one invoice on the same Purchase Request form if the justification and FAU are the same for all invoices.

For reimbursements, please clarify who made the purchase (since it may not be the same as the person completing the form). You will also need to attach the original, itemized receipts for the purchase(s),
and summarize them on the table provided. If the purchase was made with a credit card, you will also need to attach a copy of the credit card statement (sensitive information can be blacked out). Please note: justifications for reimbursements must be exceptionally strong. UCLA discourages the use of personal funds to purchase business items, so you need to have a very good reason for doing it.

For orders, there is a live link to the [Office Depot Catalog](#) for your convenience. Please complete the vendor information section, especially if you are using an unusual vendor. If you need the PO to be submitted to the vendor, be sure to select that option and provide either the fax number or the email to which the PO should be sent.

Recipient name and address must be entered, as this is where your item will be delivered. If you have an account number with the vendor, please also include that information.

Enter the quantity and unit of measure (UOM) (e.g. boxes, units, bottles, crates, etc.) in the sections provided. Be sure the unit price and catalog numbers are correct (get the information from the vendor or their catalog). Please also include a brief description of the item so that we can confirm that the catalog # is correct. The amount column will autofill after you’ve entered information into the Quantity and Unit Price cells.

### Account Information

If this purchase utilizes federal funds and if the purchase is >$2,500, you must complete this form and attach it.
Please discuss with your PI to determine the FAU information to enter into the final section of the request form. If the funding comes from a federal source, please be aware that purchased over $2,500 will require additional documentation (click on the active link in the PO Request Form to obtain the additional required paperwork). If you do not know if the funding source is federal, speak to your PI before proceeding.

What is an FAU? FAU stands for Financial Accounting Unit, and includes 3 components: Account, Cost Center, and Fund number, in that order. If the FAU is 401234-LS-54321, you would enter “401234” into the Account cell, “LS” as the Cost Center, and “64321” as the Fund. Click here for more information about FAUs.

The Project code is optional but can only be 6 characters long. The sub is typically “03” for supplies. Please use the live link on the form to determine the correct object code for your purchase. If you are requesting more than one item and they have different object codes, you will need to separate them in this section and list the correct object code for each. For the Fund Name, please insert a brief description of the FAU you are using (e.g. “Joe Bruin’s R01” or “Josephine Bruin – Bookfund.” If you need to split the charges amongst various FAU’s, or if you have more than one object code, use either the Amount section or the % section to clarify which costs belong to which FAU/object code. (You don’t need to enter both the amount and the percentage, chose whichever one is most appropriate.)

NOTE: Once the form is completed, please submit it to the Sr. Fund Manager (Chris Mullin, cmullin@mednet.ucla.edu) for his review and approval. You can either email the request form (and any relevant attachments) or print it out and put it in his mailbox. If the request is urgent, please let him know. Once approved, he will forward to Valencia for processing. Typically, this process takes 1-3 business days, unless you identify the request as urgent, in which case it can typically be processed same day. Once Valencia submits the request, the turnaround time varies depending on the vendor, type of order/reimbursement/variety of other factors.

If you have any questions regarding how to complete this form, please contact either Chris or Valencia.
PURCHASING AIRFARE / REQUESTING A PRE-TRAVEL APPROVAL (PTA) NUMBER

NOTE: The preferred method of purchasing airfare is with a PTA (Pre-Travel Approval) number. PTA’s can be used to purchase airfare when using UCLA Travel Services to arrange for a flight. Step-by-step instructions are listed below. [If you choose to purchase airfare with a personal credit card (NOT RECOMMENDED), please be sure to comply with all University and sponsor guidelines regarding the purchase of airfare. You will need to save your receipt, itinerary information, and credit card statement. Reimbursements cannot be processed for airfare until you return from the trip.] The preferred method for purchasing airfare is as follows:

1. Create a flight itinerary that meets your needs. You can call the Travel Center and have an agent find the best itinerary for you (option a), or you can use the online Conexxus Portal to do it yourself (option b):
   a. Call UC Travel (x62639). Be prepared to give them all the necessary information (as outlined in #2).
   - OR -
   b. Log into Conexxus at https://travel.ucop.edu/conexxus/ (choose the UCLA option). Be prepared to input all the necessary information (as outlined in #2).

2. Provide the necessary information to create a draft itinerary. This will include:
   a. Full name of traveler (as it appears on their photo ID). If the traveler is a UCLA employee, have the Employee ID #. If not, have the social security number.
   b. Dates and location of travel, including preferred time of departure/arrival/return, etc.
   c. Business justification.
   d. Funding source (you don’t need the PTA yet, but you’ll need to know if the funding source is federal, because flights purchased with federal funds have special restrictions).
   e. Any special requests (e.g. aisle/window seat, frequent flyer #’s, etc.)

3. Once a draft itinerary has been created, you will be asked for a PTA number. To obtain the PTA number:
   a. Forward the itinerary and the information from #2 above to both the Sr. Fund Manager (Chris Mullin, cmullin@mednet.ucla.edu) and the Purchaser (Valencia Moody, vmoody@mednet.ucla.edu) to request a PTA.
   b. In addition to the itinerary and information from #2, you will need to include the quoted cost of the airfare (plus fees) and also clarify the FAU to be used for this purchase.
   c. Chris will confirm that the purchase is allowable and that there are enough funds, and then Valencia will create the PTA for you. If the request is urgent, please indicate that in your email. If the request is urgent and it is after 3:30pm, please contact Laura Sheehan (LSheehan@mednet.ucla.edu) as both Chris and Valencia leave at 4pm.

4. Valencia will reply to your email with the PTA number.

5. Forward that PTA to your travel agent (if using the Travel Center) or enter in the PTA information on the online form (if using Conexxus).

6. Save the receipt/itinerary information for your reimbursement request. Even though the purchase will be made directly from the FAU, you will still need to indicate on your travel reimbursement form the total cost of airfare and provide the PTA number.
RESOURCES / LINKS TO FORMS

The latest version of this guide, as well as other training materials and all purchasing/travel forms are available on the UCLA Family Medicine website. Navigate to the Research Tab, and select “For Family Medicine Research Unit Employees.”

https://www.uclahealth.org/family-medicine/for-research-employees