



Standard Operating Procedure (SOP)
Authorizing Purchases Process

Table with 4 columns: SOP No., Department, Dept. Head Approval, Director Approval. Contains handwritten signatures and dates.

Purpose

To establish guidelines for Resource Management on the authorization of purchases in TMA.

Responsibility

Resource Management employees are responsible for following this SOP.

Definitions

- 1. TMA: Facilities Management's computer maintenance system/work order system.
2. Authorizing: Electronically approving all Facilities Management purchases before sending the paperwork to the EBO for processing.

Procedure

- 1. Daily review and authorize all Credit Card/Purchase Orders via the Material Browse List or Project Requisitions via email notifications from the buyer or the Project Requisition Browse.
1.A. Authorizing Credit Card/Purchase Orders via Material Browse:
1.A.1. Verify the vendor, type, department, requester, phone number, repair center, project number (if applicable), and buyer have been correctly completed by the purchaser. Correct as necessary.
1.A.2. Confirm account numbers, dollar amounts, and item amounts are correct and match the account number of the shop or linked work order(s) and/or project on both the front and second screens of the purchase. If linked to a project, confirm funds are available. Make any necessary corrections and notify the buyer if funds are unavailable.
1.A.3. If "split funding" or "split billing" type this statement in the reference number box as long as it's not linked to a project.
1.A.4. If all fields are correct and funds are available, authorize the purchase (if dollar amount exceeds Resource Management's authorization limit, contact the next level of management for authorization).

1.B. Authorizing Project Requisitions:

- 1.B.1. Purchaser notifies Resource Management that a project requisition is ready for authorization or Resource Management checks the Project Requisition Browse.
 - 1.B.2. Resource Management confirms the vendor, type, department, repair center, project number, billed account, buyer, estimate and credit account are complete and correct. If incorrect or funds are unavailable, Resource Management notifies the buyer that the requisition cannot be authorized.
 - 1.B.3. If all fields are correct and money is available, authorize the purchase and notify the buyer (if dollar amount exceeds Resource Management's authorization limit, contact the next level of management for authorization).
2. Process complete.