Standard Operating Procedure (SOP)
TMA Purchasing for Projects

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**Purpose**

To establish guidelines for purchasing materials, services, and equipment for projects using Facilities Managements Computer Maintenance Management System (TMA).

**Scope**

This SOP identifies the process required for project purchases within TMA including the steps for purchasing material that a Contractor will install, purchasing material that Facilities Management shops will install, purchasing services for labor only, and services for labor and material. This SOP also includes the requirements for receiving the material at Facilities Managements warehouse or the project site.

This SOP does not cover any requirements from WVU Procurement & Payment Services, the Expert Business Office (EBO), or processes and procedures for purchase authorization, project initiation, and project closeout.

**Responsibility**

1. The following people are responsible for following this SOP.

   1. A. Managers
   1. B. Project Managers (PM)
   1. C. Operations Coordinators (OC)
   1. D. Buyers
   1. E. Warehouse Staff
   1. F. Associate/Assistant Directors
   1. G. Supervisors
   1. H. Operations Managers
   1. I. Accountants / Financial Analysts
   1. J. Project Estimators

**Definitions**

1. **TMA:** Facilities Management’s computer maintenance management system/work order system.

2. **Project Requisition:** The TMA tool used to purchase materials, rental equipment, and services from outside vendors specific to a project.

3. **Credit Card/Purchase Order:** The TMA tool used to purchase materials, rental equipment, and services from outside vendors specific to a work order.
Procedure

**Note:** Anything being ordered for a project must be approved for purchase by the appropriate project manager or responsible party (the party with budget authority over the specified funding support) prior to ordering.

All purchases/orders that are funded through capital sources should take place within the Administrative Services Unit of Facilities Management. During those times that purchases/orders requests are given to groups other than the Administrative Services Unit, that employee will direct the requestor to the responsible party within Administrative Services. At no time shall capital funding be utilized by anyone other than designated staff as a source of funding for purchases/orders.

1. Ordering Material for a Project that a Contractor will Install:

   1.A. A TMA Project Requisition, linked to the project, is used to buy this material. This includes material that is purchased via P-Card or a Purchase Order.

   1.A.1. It does not matter whether the material is being delivered to the jobsite or being delivered to the Warehouse.

      1.A.1.a. If the material is being delivered to the Warehouse, a copy of the TMA Project Requisition must be submitted to the warehouse so they can check what was ordered and actually delivered.

      1.A.1.b. The Warehouse physically receives the material and does not receive within TMA. Warehouse notifies the Project Manager the material has been delivered and if there are any discrepancies.

      1.A.1.c. The Project Manager enters actual invoiced amount within TMA against the Project Requisition.

2. Ordering Material for a Project that Facilities Managements Shop will install:

   2.A. The Project Manager must request a Work Order for the shop to do the work.

   2.B. A TMA “Credit Card/Purchase Order” is used to buy this material and is linked to the Work Order.

      2.B.1. The material is required to be delivered to the warehouse or job site.

      2.B.2. If delivered to the Warehouse the warehouse will physically receive the material and notify PM to receive within TMA.
3. Orders for Services only (Includes A/E Firms, Consultants, and Contractors that are only providing installation services):

3.A. A TMA Project Requisition, linked to the project, is used. This includes services that are purchased via a Purchase Order.

3.B. The Project Manager enters actual invoiced amount within TMA against the Project Requisition.

3.C. If you are buying material for a contractor to install use the procedure in Item #1 above.

4. Orders for Services plus Materials (Includes Contractors that will supply and install material):

4.A. A TMA Project Requisition, linked to the project, is used. This includes services that are purchased via P-Card or a Purchase Order.

4.B. The Project Manager enters the actual invoiced amount within TMA against the Project Requisition.

5. Orders for Equipment Only (Ex: Custodial equipment):

5.A. A TMA Project Requisition, linked to the project, is used. This includes equipment that is purchased via P-Card or a Purchase Order.

5.B. The Project Manager enters the actual invoiced amount within TMA against the Project Requisition once equipment has been received.

5.C. Equipment, materials, supplies, rentals up to $25,000 in value can be purchased through the Warehouse buyers with the following qualifications:

5.C.1.a. Purchase is not in support of or linked to a project in TMA or MAP. If linked to a project all information must be processed through PMs and or OCs.

5.C.1.b. Warehouse buying staffs are charged to research each purchase to insure that the correct format is chosen, i.e. that the purchase is not project related.

5.C.1.c. Material only – no service or labor.

5.C.1.d. Any orders with LOT quantities need to be addressed and ordered through FM Admin Operation Coordinators.