Purchasing using an Online Voucher: Direct Payment Request

**IDENTIFY NEED**

Need is identified for a low-risk purchase that doesn't require a Purchase Order

Whenever possible, it's recommended that every effort is made to make purchases through a Preferred Vendor

**FIND SUPPLIER**

Locate best value supplier; for purchases over $25,000, PRS approval is required

Is there a conflict of interest?

Select vendor, negotiate best price. Inform vendor of NU tax-exempt status and if necessary, proof of tax-exempt status is available from PRS

Have someone else make purchasing decision

Look up/add vendor in NUPortal

**Applicable Policy/Training Notes**

This process is for reference when you place an order, receive, and then pay for low risk purchases, when a formal Purchase Order isn't needed, or for direct-billed contracted services. Examples can include membership dues, subscription fees and emergency equipment repair.

- Financial Policies and Procedures
- Purchasing Resource Services
- Bid Process policy and information
- Items H (Bid Process) and I (Sole Source) in Purchasing Policy & Procedures
- Conflict of interest policy (research with NIH)
- NU conflict of interest policy
- Guidance for Answering Staff COI Questionnaire
- Tax-Exempt status and resources
- Item R (Tax-Exempt Status) in Purchasing Policy & Procedures
- Financial Policies and Procedures
- Item AC (Requesting New Vendors) in Purchasing Policy & Procedures
- Finance, Facilities, and Research Administration Training: FMS815 Requester Advanced Topics (Purchasing Tab)
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**PLACE ORDER**
- Place order

**RECEIVE ORDER**
- Receive service and invoice
- Is good/service satisfactory?
- Contact vendor

**PAY FOR ORDER**
- Complete an Online Voucher in NUFinancials (choose type: DPR), Check Budget, attach invoice/documentation and Submit
- Approve through workflow; if over $25,000 goes to PRS for approval

* With Online Voucher DPRs, you might pay for a good or service before receiving it (e.g., membership dues or subscriptions), so the Pay Supplier step in this process may sometimes come before the Receive Order step.

- See the **Purchasing Policy**
- Finance, Facilities, and Research Administration Training (Purchasing Tab)
- Chart String Overview
- Identify Appropriate Chart String
- Item K (Special Requisition Types) in Purchasing Policy & Procedures
- It’s very important to use the correct account. Misclassification of expenses may have serious consequences.
- Examples of when to use Receive By Dollar Amount

- Finance, Facilities, and Research Administration Training: FMS832 Online Vouchers (Payments Tab)
- Item M (Approvals/Workflow) in Purchasing Policy & Procedures
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Sponsored chart string?

All sponsored project travel, equipment, consultants, subcontract purchases, regardless of amount, go to ASRSP for approval.

All purchases over $2,500 automatically go to ASRSP for approval.

If you have subcontracts, contact ASRSP for special procedures and processing.

- Item M (Approvals/Workflow) in Purchasing Policy & Procedures (Additional Special Approvals)
- ASRSP: Policies and procedures information
- Office of Cost Studies
- Research section of Policies website
- There are several resources for Sponsored project training. If you are new, your main resource is Research Administrator Training.
- Finance, Facilities, and Research Administration Training (Grants Tab)

Goes to Accounts Payable

Check is cut and sent directly to vendor; if necessary, can be held for pick-up.

Reconcile budget on a monthly basis.

- Finance, Facilities, and Research Administration Training: FMS723 Reconciling Budgets (Budgeting Tab)

- Process Map created in partnership between HR Learning & Organization Development, Financial Operations and Accounting Services, Purchasing Resource Services, Accounts Payable, and Accounting Services for Research and Sponsored Programs.
- Please share your feedback about this Process Map by completing a brief survey.