



UNIVERSITY OF CALIFORNIA, SAN DIEGO PURCHASING AUTHORIZATION FORM

(6/04)

Please refer to policy information and instructions attached to this form

Please check the statement(s) describing the actions(s) to be taken, then complete Sections 1, 2 & 3.

SIGNATURE OF PERSON RECEIVING AUTHORIZATION

- Obtain access to the online IFIS Purchasing module (IFIS User ID: _____)
- Obtain a new delegation of authority/ buyer code to:
 - Issue and approve Department Orders only
 - Issue and approve Express Order purchases only
- Prepare and approve High Value Purchase Requisitions
- Add organization number(s) to a delegation already on file
- Delete organization numbers(s) for an existing delegation
- Delete a delegation of authority/ buyer code due to separation, transfer, etc. Effective date: _____
- Record a change in name for existing delegation/ buyer code. Employee name before change: _____
Old Name: First, MI, Last

SECTION 1: EMPLOYEE INFORMATION

FIRST NAME	MIDDLE	LAST NAME	
DEPARTMENT NAME:	EXTENSION:	MAIL CODE:	EMAIL ADDRESS:
PAYROLL TITLE:	**EMPLOYEE ID (see note below)		BUYER CODE: <small>Assigned by Purchasing.</small>
**NOTE: Justification is required for granting non-university employees a formal delegation of purchasing authority. Forward a justification statement, with MSO or Department Business Officer's signature to Purchasing (0914) for review and approval. The Purchasing Manager reviews all requests before granting an exception.			

SECTION 2: ORGANIZATION INFORMATION Please list all organization codes below. Attach additional sheets if necessary

SECTION 3: DEPARTMENT APPROVALS:

PURCHASING DEPARTMENT APPROVAL ONLY:

Approval: _____
Department Head Date

OR

Approval: _____
Principal Investigator (if funding is under Federal Demonstration Project Regulations) Date

AND

Approval: _____
MSO, DBO, or Fund Manager Date

Approved:
Title Date
In accordance with PPM 523 Purchasing Authorization may be delegated only by and with the approval of the Purchasing Manager or his/her designee.

Purchasing to return approved copy to:

Name: _____ Mail Code Phone _____

PURCHASING AUTHORIZATION POLICY AND INFORMATION

INSTRUCTIONS

Complete all appropriate sections on the form; have it endorsed by the Department Head or by the Principal Investigator (where funding is under the Federal Demonstration Project) and forward to Purchasing, 0914. Purchasing will return a copy noting the assigned Buyer Code after approval has been granted by the Purchasing Manager or designee. The person receiving the delegation of departmental purchasing authority should retain a copy of this policy and information sheet for future reference.

GENERAL POLICY INFORMATION

In accordance with BUS 43, the Purchasing Manager may delegate departmental purchasing authority to purchase materials, supplies, services, and repairs that do not exceed \$2,500 (including tax, freight and handling charges). This authority allows individuals with this delegation to commit funds by Department Order, Express Order, or other established purchasing methods. No other University staff or faculty may re-delegate the authority granted to them by the Purchasing Manager or designee to any other individual. The department buyer has a low value purchase delegation not to exceed \$2,500 per order/ supplier for materials and supplies not available through campus storehouse, and for repairs not available from campus organizations.

Individuals receiving such delegation are responsible to comply with all applicable University policies and procedures, and are subject to the provisions of PPM 523-4, "Departmental Purchasing Authority." Under the delegation of departmental purchasing authority, you may not make purchases that:

- a) Are artificially divided into individual orders under \$2,500
- b) Are for items defined as equipment (equipment is defined as any non-expendable, tangible personal property with a cost of \$1,500 or more, is free standing and has a normal life expectancy of more than one year. For more information about equipment, please see [Equipment Management Basics](http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,3470,00.html) at <http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,3470,00.html>)
- c) Require unique administrative and financial attention (i.e., split funding, change orders)
- d) May generate multiple invoices
- e) Are for items restricted from the low value process (for a complete listing of restricted items, please see [Items Restricted From Department Order](http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,5050,00.html) at <http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,5050,00.html>)

Process any purchases subject to any of the above restrictions either by issuing a high value purchase requisition for processing by the professional buyers in Purchasing, or by methods specified in see [Items Restricted From Department Order](http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,5050,00.html) at <http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,5050,00.html>. Do not use the purchasing tools designed for use by departmental employees to avoid compliance with University policy or procedure.

DEPARTMENT ORDERS (Low Value Purchase Orders)

A Department Order includes most purchase orders of \$2,500 or less, including tax, freight, and handling charges, with the exception of the restricted items referenced above. Only individuals with pre-approved delegation of purchasing authority and a Buyer Code may generate Department Orders. For online entry of Department Orders, the buyer must also have an IFIS UserID and password, and have completed appropriate training in order to access the Purchasing module.

Internal audit or an appropriate designee of the Purchasing manager conduct periodic appraisals to ensure proper performance under this authorization and to provide a basis for adjusting or discontinuing the delegation to the individual as the findings indicate. The Purchasing Manager reserves the right to limit the number of delegations issued to each department, and to withdraw this authorization upon evidence of non-compliance with established regulations.

HIGH VALUE PURCHASE REQUISITIONS (Requests)

A requisition generally encompasses all purchase orders with a value greater than \$2500. Only those who have authorization from their Department Head or Principal Investigator to expend funds may enter requests. To enter requests in the Purchasing module, the requestor must have an IFIS UserID and password, and have completed appropriate training. Professional buyers process the requests as High Value Purchase Orders to the vendor.

EXPRESS ORDER

Express Order is a process used by departmental buyers or their designees to consolidate ordering, recording, and payment of a transaction with designated vendors. Express Order synchronizes the commitment and recording of the order and payment into a single process.

In order to use the Express Order purchasing process, obtain a delegation of purchasing authority by completing the Purchasing Authorization Form. The delegation of authority for Express Order transactions is \$2,500. Please access the [Express Order Overview](http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,3180,00.html) Blink page at <http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,3180,00.html> to view a list of the suppliers using the Express Order process. Visit [Express Order: General Procedures and Guidelines](http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,4626,00.html) at <http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,4626,00.html> for information on Express Order procedures.

For additional Purchasing information, please contact the Purchasing office at x43084, via [e-mail](mailto:purchasinginfo@ucsd.edu) at purchasinginfo@ucsd.edu or visit the [Blink Buying tab](http://blink.ucsd.edu/Blink/External/Topics/1,1105,5,00.html) at <http://blink.ucsd.edu/Blink/External/Topics/1,1105,5,00.html>.