3201.3 Purchasing Methods

The University has defined standard purchasing methods for procuring goods and services for University business purposes which are listed in the chart below in order of preference.

- Refer to the University Buying Guide [5] website for guidance on selecting preferred vendors and the appropriate purchasing method: either preparing a purchase requisition or using a PCard.
- Unless otherwise specified, individuals must adhere to the purchasing method(s) identified for each Commodity.
- Regardless of the method used, documentation, authorization, compliance with policies and procedures, and individual transaction accounting integrity is the responsibility of the initiating department

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<th>Purchasing Methods</th>
<th>Brief Description</th>
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| Purchase Requisitions        | - Yale’s electronic requisitioning systems, such as SciQuest and other internal subsystems, are the University’s best practice approach and are required for purchasing common goods and services See Procedure 3201 PR.01  
- If a SciQuest requisition cannot be used for a purchase, the Yale PCard is the preferred alternative purchasing approach.  |
| Yale Purchasing Card         | - Yale Purchasing Cards (P-Cards) may be used for travel and entertainment (T&E) expenses and miscellaneous small dollar (<$2000) business purchases not available through SciQuest.  
- Note: All invoices reflective of Pcard Transactions, including “confirmation invoices”, should be sent directly to the department for validation and NOT to Yale Shared Services. This will help to decrease possible duplicate payment.  
- All PCard transactions must be processed and approved in a timely manner using Yale’s Expense Management System (EMS).  
- Refer to Procedure 3215 PR.01 [6], Purchasing Card and Expense Management System for more details |
| Contact Vendor Directly (Ok-to-Pay Invoices) | - OK-to-pay invoices are not appropriate for most commonly purchased goods and services and should be minimized.  
- OK-to-Pay invoices are not appropriate for use with vendors that are available in SciQuest. |
| Personal (Out-of-Pocket) Funds | - In limited circumstances, small dollar purchases may be made using personal funds.  
- Reimbursement for purchases of this type should be done via EMS |