



How do I purchase approved Budgeted items?

Initiate a Purchase Form - The [Purchase Form](#) is available on the Business Services' website (located at the bottom of the page)

Purchase Order numbers may be acquired from Business Services for vendors who request PO numbers.

Purchases must be **approved in advance** as follows:

- **Up to \$10,000** - Department Chair/Supervisor or designee must approve purchases of items included in their Department's budget.
- **\$10,001 up to \$100,000** – You must have prior approval of the Department Chair/Supervisor and a member of the Leadership Team. Items ordered in this range **MUST** be entered into Grizmart prior to ordering and require the vendor have an up to date Payment Works profile (check with business office if you're unsure if a vendor is active in our system) Items or aggregate supply orders exceeding \$10,000 in a fiscal year require three documented quotes (for each purchase), to be submitted along with the purchase form. Business Services can assist in conducting this type of limited solicitation. Items covered by a term contract still need to go through Grizmart.
- **\$100,001 & up** – You must have prior approval of the Department Chair/Supervisor, a member of the Leadership Team and the Dean/CEO. Items or aggregate supply orders that exceed \$100,000, will generally require a written bid process. Submit the Purchase Form with all detailed specifications to Business Services. Please keep a copy for your records. Business Services will work with you to facilitate the bidding process as appropriate. This process, from submission to the bid awarding, may take up to 90 days.

Non-Budgeted Purchases: Purchases in excess of the the departmental budget must be submitted to the Leadership Team for review as a budget modification **prior to** committing to a purchase.

Making the Purchase

Billed Vendor Purchases: You may place orders with approved vendors who will invoice the college rather than requiring payment before delivery. Please be sure to provide Business Services the original invoice and any packing slips received with the delivery. You may need to verify vendor status with the business office prior to ordering. You must always verify the items received are the items ordered and that the items were received in good condition. **Handwritten** initials or signature is required on

purchase order next to ordered by and received by. Typed initials will be returned to the supervisor for correction.

COSTCO Card: Helena College has a COSTCO Card which is available from Business Services. The card is available for sign out on a first-come, first-serve basis. The card must be returned the same day. Costco purchases are to be paid for using your ProCard.

Procard: These are credit cards issued by Helena College to employees to make business related purchases **only**. Some cards are for travel only and others are available for general purchasing. Purchases can only be made by the person named on the Procard. (**Do not** loan your card to anyone.) Please refer to the UM Procard Quick Reference Cardholders Guide for allowable purchases on the Business Services web site. <http://umhelena.edu/businessservices/Docs/UM%20Procard.pdf>

PLEASE NOTE THAT FOOD ITEMS, COMPANION AIRLINE TICKETS, SEAT UPGRADES, GIFT CARDS, AND MOTOR POOL GAS ARE NOT ALLOWABLE CHARGES ON THE PROCARD.

When using the Procard for internet purchases please remember to use the "Bill To" address: Business Services, 32 Campus Drive #2304, Missoula, MT 59812-0003.

Receipt of Order: All orders need to be inspected upon receipt for accuracy, completeness and condition of items. Any concerns with the shipment must be communicated to the vendor ASAP. Once the order has been verified, sign and date the "**Order has been received**" section of the Purchase Form.

Deliveries: Helena College deliveries are routed through the Cashier.

Documentation of the Purchase: After receipt of items, submit required documentation to Business Services for payment. All documentation must be submitted or it will be returned to the originator without being paid. Required documentation includes:

- Purchase Form **must include approval signatures, Index Code(s), Expense Code(s)**
- Business Entertainment/Meeting Expense/Alcoholic Beverage Approval Form (Meeting Expenses Only)
- Itemized Receipt(s)/Invoice(s)/Packing Slip(s)
- Meeting Agenda/Minutes (as appropriate)
- Meeting Attendee List (as appropriate)
- Any other information needed to identify the item/service purchased, cost, who we owe for the item/service and contact information for that individual/organization.

Bookstore Items: Items that are available for purchase from the Bookstore do not require a Purchase Form. These items will be charged to your budget on a monthly basis.

Travel information: Must be documented on a Travel Expense Report. Please see the Travel Procedure Highlights for more information regarding travel costs.