

School of Education and Social Policy
Purchasing Tip Sheet
September 2013

This document highlights best practices for common purchases, using direct billing to chart strings. This is not an inclusive list and does not supersede University policy. For complete policies, see the University's Purchasing Policy and Procedures <http://www.northwestern.edu/userservices/purchasing/policy.pdf>.

What You Buy

- Office Supplies
- Technology – AV Equipment, Computer Hardware and Software
- Conference Registration Fees
- Membership Dues
- Journal Subscriptions

Why You Should Buy Using Direct Billing

- Avoid paperwork and need for signatures
- Avoid laying out own money
- Avoid waits for reimbursements (4-6 weeks)
- No more lost sales tax
- No more scrambling to find receipts
- No more waiting until after conference travel to receive money back
- Receive best deals through University discounts

How To Buy

Office Supplies & Books

Faculty members are set up as “shoppers” in iBuyNU, which can be accessed via NUPortal <https://nuportal.northwestern.edu>. In the Office Max or Complete Book online store, create a shopping cart with your desired items, and then send the shopping cart to your department administrator for processing. Ask the administrator to help you set up your iBuyNU account if you do not already have one. Email the administrator the programmatic justification of the purchase (relationship of purchase to faculty member's academic work or research). Alternatively, you may email purchase requests to your department administrator. Provide as many details as possible (vendor, website, item number, cost), the justification of the purchase and the chart string to which the item should be charged (faculty account, grant or department).

Technology – AV Equipment, Computer Hardware and Software

Requests for technology items should be emailed to Mike Hannen mhannen@northwestern.edu. Mike works as your shopping consultant in order to: 1) find the best deals 2) help you avoid overbuying equipment that SESP already has 3) make sure that SESP has infrastructure to support the equipment you buy and 4) make sure the expense is allowable under your faculty or grant account, if applicable. Your email should list detailed item information or a description of technology needs if specific items have not been identified. The email should also include the chart string to which items should be charged. Mike will locate the best deals and respond with pricing information. Once you confirm the order with Mike, he will make the purchase on your behalf.

Conference Registration Fees / Membership Dues / Journal Subscriptions

Provide the order form for registration fees, membership dues, and journal subscriptions to your department administrator. Inform the administrator where to charge the expense. Remember that even if your conference registration fee was paid on p-card or mailed with a university check, it must still go on your travel expense report as “non-reimbursable” (just as with direct-billed airfare).

Catering

Before ordering catering for an event, you need to make sure it is allowable on the funding chart-string and per the SESP courtesy guidelines. If those two things are positive, then there are three ways to order food.

- Providing a purchase order number to caterer
- Ordering with a p-card
- Fronting personal funds and requesting a reimbursement

There are a limited number of caterers who accept Northwestern purchase order numbers. To find the most up to date list, use the university's [preferred vendor matrix](#). There are others that are not on the list, so it's always best to ask your caterer if they will accept a university purchase order.

Many department administrators have been issued p-cards that can be used for catering. This is acceptable if, again, the event adheres to the SESP courtesy guidelines and if the vendor does not accept a purchase order number. It is critical that all the rules for the p-card are followed.

Personal funds: remember to submit for reimbursement within 30 days.

For ALL food / catering / entertainment bills:

- No sales tax (within the state of IL)
- List of all guests and their university affiliation
- Programmatic justification