**UTDesign Purchase Process**

***Don’t delay what you can do today! Items can take up to 6 weeks for delivery.***

1. **Determine supplies needed.** 
   1. Anticipate your needs, confirm with your team and faculty advisor. Ask your advisor for recommendations for reputable, reliable vendors for the parts you need. Your advisor can suggest vendors that offer educational discounts.
   2. Be aware of product lead-times and plan accordingly. In general, UTDesign will not pay expediting fees or overnight delivery costs.
   3. Consider [university-approved vendors](http://www.utdallas.edu/utdesign/students/resources/ordering/vendors/) first, i.e. Digi-Key, Grainger, Fastenal. These vendors have established discounts with the university. Be aware also that extra time may be required to establish accounts for vendors that are new to the university.
   4. Purchasing from online auction sites is not permitted.
   5. Shop for best prices. Consider your budget and expenditures. Ask if the vendor offers an education/university discount.
   6. Consider vendor shipping location. Shipping costs affect the total cost of the procurement acquisition. Local vendors or vendors with offices in the area typically offer better service and support.
   7. For small, low-cost items, consider buying extra items in case of failure or loss of a critical component.
2. **Purchase goods (two methods).**
   1. Complete [UTDesign Procurement Request form](http://www.utdallas.edu/utdesign/students/forms/) **(preferred method)**.
      1. This is an Excel form, so you can ADD rows if you have more than 6 items to order.
      2. Provide accurate catalog numbers, *not mfg. numbers*. If catalog numbers are incorrect, the form will be returned to the requestor for corrections.
      3. Be descriptive with each requested item. “Screws” or “bolts” does not provide enough information.
      4. Complete every box in the top section. Save the form with your static information in case you need to order more items later.
      5. Attach or email any files necessary to make the purchase, i.e. circuit board drawings.
      6. A quote should be attached for any specialty equipment or items not readily available via an online catalog.
      7. Capture signature approval(s). In lieu of actual signatures, the form can be approved by the student emailing it to project faculty advisor. The faculty advisor will review and submit the form to the UTDesign office if it is approved.
   2. Student purchase from local vendor (small, inexpensive items only) or for software/server services.
      1. Use this option only for small or last minute purchases of $20 or less or for online services that require a student login.
      2. Provide printed copy of [UT Dallas tax exemption certificate](http://www.utdallas.edu/utdesign/files/UTD-Texas-Sales-and-Use-tax-exempt-cert.pdf) to vendor and complete any of the vendor’s required forms. You may not be reimbursed any sales tax you paid.
      3. Complete UT Dallas [Business Expense Reimbursement](http://www.utdallas.edu/forms/documents/business-expense-reimbursement.doc). Use [example of completed form](http://www.utdallas.edu/utdesign/files/reimbursement-form-example.pdf).
      4. Attach original Itemized receipt(s). Receipts should be carefully taped to a sheet of 8.5” x 11” paper for submission. Multiple receipts can be placed on one sheet of paper. DO NOT TAPE DIRECTLY ON PRINT. Tape will “erase” the print over a short period of time.
      5. Capture faculty advisor signature approval on the receipt page(s).
      6. If multiple purchases are made, the receipts should be accumulated and turned in together to minimize the work required to process the reimbursements.
      7. Reimbursement for students not employed by the university will be asked to set up a direct deposit form for the funds to be transferred directly to the student. Reimbursement for student employees will be by direct deposit. The payment process may take up to a month to complete.
3. **Submit to UTDesign**.
   1. Submit completed forms through email or in printed form to your team’s faculty advisor for approval.
   2. Faculty review the procurement request (and any attachments) and if approved, the advisor will forward to the [UTDesign@utdallas.edu](mailto:UTDesign@utdallas.edu) for processing. If the total procurement request is over $500, the faculty advisor will forward to their department’s UTDesign director for further review and approval.
   3. Emailed UTDesign Procurement Request forms will not be accepted directly from students.
   4. Incomplete, inaccurate or unapproved forms will be returned to requestor.
4. **UTDesign Procurement Request form is processed by UTDesign.**
   1. UTDesign may take up to two business days to process procurement requests.
   2. Orders will be shipped by ground unless this is not provided by vendor. ***Plan ahead!***
   3. You and your faculty advisor will be notified BY UT DALLAS EMAIL when order is placed. Follow up on orders when you have not received order confirmation from the UTDesign office.
   4. You and your faculty advisor will be notified when/if shipping information is available.
5. **Receiving your orders**.
   1. You and your faculty advisor will be contacted BY UT DALLAS EMAIL when order has been received by UTDesign.
   2. Pick up and sign for orders at the UTDesign office.
   3. Teams are responsible for making arrangements for items that may require special handling (e.g., forklift) or storage after delivery.
   4. Secure your project materials when possible to prevent theft.
6. **Track expenses.**
   1. Total expenses are not to exceed $1,000 per semester ($2,000 total for two-semester projects) unless otherwise indicated by your department UTDesign director.
   2. UTDesign will not approve any expenses over budget without permission of the UTDesign program coordinator.
7. **Returning purchased items.**
   1. If items need to be returned, talk to the UTDesign office. Not all items can be returned or may be feasible to return.
   2. If items have been returned that were purchased personally, please provide credit documentation to the UTDesign office
   3. Double-check the need for items on the original purchase to prevent the need for any return.