

## STANDARD OPERATING PROCEDURE-POLICY

### OB/GYN Procurement

#### SCOPE/APPLICABILITY:

OB/GYN Department purchase or reimbursement requestors should be aware of and adhere to this policy.

#### PURPOSE:

To outline how to submit purchase or reimbursement requests including general timelines to expect. Failure to follow this process can delay your request being completed.

#### DEFINITIONS:

Fiscal Year (FY) runs from July 1 to June 30.

#### PROCEDURE:

- Email requests to [HSC-OB-Purchasing@salud.unm.edu](mailto:HSC-OB-Purchasing@salud.unm.edu).
- All expenses must comply with the University's guidelines, as outlined in University Policy 4000, 4030 or other related policy.

#### PCARD PURCHASES:

- Email complete requests at least 3 business days in advance for simple purchases. Same-day purchase requests will be rare. Incomplete requests will cause delays.
- Certain purchases will need more lead time (often 1-2 weeks), such as those involving contracts, Restricted grant/contract funds, special events, gift cards, participant incentives, travel items, or purchases over \$5K.
- Complete requests will include the following **6 W's**:
  - **Who** is the purchase for? Food/meal purchases should include attendance list and affiliation to UNM if not a UNM employee.
  - **What** is being requested? Provide necessary details like website links and item descriptions.
  - **When** is the purchase needed or when is the event?
  - **Where** will the purchase be used or the location of the event?
  - **Why** are we making this purchase? How does it benefit UNM?
  - **Which** index to charge? If you don't know the 6-digit index number, describe the index (Smith FOM, MFM Fellowship, etc.).

#### REIMBURSEMENT:

- PCARD is preferred in general but reimbursement requests may also be submitted; reimbursement is not guaranteed and depends on the nature of the purchase.
- Reimbursement requests should be submitted timely.
  - If a reimbursement request is not completed in the system within 60 days from receipt date or last day of travel, it will be taxable income.
  - Requests not completed within 180 days will be denied.

*This information is a guideline and should not be considered as inclusive of all proper treatments or methods of care or as a statement of the standard of care.*

- The OBGYN Finance Team will generally submit your complete reimbursement requests within 3 business days. Incomplete requests will cause delays.
- Complete requests will include the 6 W's and itemized receipts (picture or scan ok) will be attached. Receipt should include purchase date, detailed list of items purchased, total showing if tax was included. Tax will not be reimbursed on physical goods.
- For travel reimbursements, submit an all-in-one request after travel has concluded (if possible, use PCARD for prepaid travel costs). Avoid submitting multiple reimbursement requests for the same travel event.

**[DO NOT EDIT BELOW THIS POINT]**

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**APPROVALS:**

SOP Owner:		Date:
Chair Approval:		Date:
Effective Date:		