

INSTRUCTIONS TO DEPARTMENT

Procurement is accountable for all Limited Purchase Orders issued to departments. Each LPO should be used in numerical sequence. LPOs are to be used for emergency and after hours purchases, except as noted below. Departments should maintain a record of the LPOs used, including number, vendor, amount, etc. Purchases may not exceed \$1,999.99 and it is **not permissible** to combine LPO's to make a purchase for more than \$1,999.99. LPOs may not be used as a blanket order.

The use of this form is normally limited to local vendors, but may be used for a vendor out of the local area when the vendor agrees to comply with the instructions shown on the form (for example, a vendor providing repair services). LPOs **cannot** be issued to individuals for payment of services rendered, nor should they be used to request payment for routine services. Examples include, but are not limited to: consulting, landscaping, and craft trades (painting, plumbing, etc.). Excluded from this policy statement are catering services.

LPO used for entertainment must include the following documentation:

- a. Date, Time and place of entertainment.
- b. Name, title and occupations of person(s) being entertained.
- c. Number of persons in attendance.
- d. The principal character or purpose of the entertainment occasion. It should be expected that the University will receive direct benefit as a result of making these entertainment expenses.

LPOs must show a description of items purchased. When purchasing food items, the Department must submit the itemized register receipt to the LPO. If itemized register receipt is not available, the department **must** itemize on the LPO form.

LPOs must be signed by two different individuals, one of whom must be the official responsible person (or his/her designee) for that account. LPOs cannot be paid without proper signatures.

INSTRUCTIONS FOR COMPLETING LPO FORM:

1. SUPPLIER NO. - To be completed by Department when entered into Oracle.
2. TO: - Name and remit to address of supplier.
3. MINORITY OR WOMAN OWNED - To be completed by Department.
4. W.O. NO. - To be used by department if needed.
5. INVOICE NO., DATE, TOTAL, AND DISCOUNT - Department must complete the area on the form showing invoice number, date, total and payment terms, discount if applicable.
6. ACCOUNT, OBJECT, PERCENT - To be completed by Department.
7. QUANTITY, DESCRIPTION, UNIT PRICE, EXTENDED PRICE, TOTAL - Must be completed in detail by Department.
8. DELIVER MERCHANDISE TO: - Must be completed in detail by Department.
9. REQUESTED BY, AUTHORIZED BY - Must be signed by two different individuals, one of whom must be the official responsible person (or designee) for account.
10. RECEIVED BY - Person receiving merchandise,
11. FOR QUESTIONS CONCERNING THIS LIMITED PURCHASE ORDER CONTACT: - Person who will be able to assist should any problems arise concerning this LPO.
12. Department must key the LPO information into Oracle using the Disbursement Requisition-All Other payment type and forward through Oracle workflow.
13. DEPARTMENT MUST OBTAIN RECEIPT AND INVOICE FROM SUPPLIER AND FAX INTO OPTIDOC WITH THE (WHITE) COPY OF THE LPO, USING THE PAYMENT SUPPORT FAX COVER FORM FOR LPO's. Fax # 6-4701. The Payment Support Fax Cover Form is located on the Administrative Computing website <http://www.uab.edu/adminsistemas/>. Users should click on the "Payment Support Fax Cover Form" link from this site.
The LPO number and Oracle Payment Request Number are required fields on the LPO coversheet.
14. UAB procurement will match Oracle request to Optidoc image and process payment.



UNIVERSITY OF ALABAMA AT BIRMINGHAM

THIS PREFIX & NUMBER MUST APPEAR ON ALL INVOICES, LABELS AND CORRESPONDENCE

LIMITED PURCHASE ORDER

The furnishing of materials, supplies, equipment, or services to the University under this purchase order, contract solicitation for bid or construction specification constitutes assurance by the vendor or contractor of his compliance with applicable provisions of and pertinent regulations promulgated under Executive Order 11246, as amended (Equal Opportunity Employment), issued by the President of the United States of America, Public Law 88-352, 88th Congress, the "Civil Rights Act of 1964". Vendor represents and warrants that all articles and services covered by this purchase order meet or exceed the safety standards established and promulgated under the Federal Occupational Safety and Health Act of 1970 NO. 2006 and its regulations in effect or proposed as of the date of this purchase order. When applicable, all articles and services must also meet or exceed other federal requirements including, but not limited to, ADA, FDA, the Omnibus Reconciliation Act of 1980, etc.

SUPPLIER NO. _____

TAXPAYER IDENTIFICATION NO. (TIN) 63-6005396

TO: _____

These items will be under the control of and for the sole use and benefit of UAB and are exempt from sales and use taxes. Ala. Dept. of Rev. Sales & Use Tax Rule 810-6-3-.47.04

Supplier Name _____

Check here if supplier is minority or woman owned

Supplier's Remit Address _____

TO BE COMPLETED BY DEPARTMENT:

W.O. NO. _____

INVOICE NO.	INVOICE DATE	AMOUNT	DISCOUNT


University GL String	%	Amount

GA String	%	Amount

ONLY ONE INVOICE PER LPO - DO NOT BACK ORDER NOT VALID OVER \$1,999.99 - NO SUBSTITUTED ITEMS

See Reverse Side of This Form For instructions

By accepting this form, the supplier agrees to comply with the instructions shown on the reverse side.

QUANTITY	DESCRIPTION	UNIT PRICE	EXTENDED PRICE
			
NOT VALID OVER \$1,999.99			TOTAL

DELIVER MERCHANDISE TO:

NAME _____

DEPARTMENT _____

PHONE NO. _____

THIS PREFIX & NUMBER MUST APPEAR ON ALL INVOICES, LABELS AND CORRESPONDENCE

BLDG. _____

RM. NO. _____

REQUESTED BY _____

DATE _____

DISTRIBUTION OF COPIES.
Part 1 (White) - Department Copy
Part 2 (Canary) - Suppliers copy
For Questions Concerning This Limited Purchase Order, Contact:

STREET ADDRESS _____

AUTHORIZED BY (Original Signature Required) _____

DATE _____

CITY _____

STATE _____

ZIP _____

RECEIVED BY _____

Name _____ UAB Ext. _____

INSTRUCTIONS TO SUPPLIER

The UAB Executive Director of Procurement has authorized the use of the Limited Purchase Order (LPO) in lieu of the formal purchase order for the emergency and after-hours purchases. The authority to purchase is delegated to the departmental authority signing the LPO form. LPOs **cannot** be used to individuals for payment of services rendered, nor should they be used to request payment for routine services. Examples include, but are not limited to: consulting, landscaping, and craft trades (painting, plumbing, etc.). Excluded from this policy statement are catering services.

LPOs are valid for purchases up to \$1,999.99.

Fill order promptly, without backorder or substitution.

LPO forms may not be used as a blanket order.

Supplier should deliver merchandise directly to the individual whose name and location appear at the bottom of the LPO form. Deliveries may be made to UAB receiving when unable to deliver directly to the department. Packages must be properly labeled with LPO number, name and location of individual ordering merchandise.

Department should complete the area of the form showing invoice number, invoice date, invoice total, and payment terms if applicable.

Department must fax the LPO into the University's Optical Imaging System using the Payment Support Fax Cover Form for LPO's. <http://www.uab.edu/adminsystems/> Fax # 6-4701.

A complete description of merchandise purchased must be on LPO. When food items are purchased, the Department must attach the itemized register receipt to the LPO.

Supplier should retain the second copy (canary) of the LPO for your files.

All inquiries regarding the **LPO procedure** should be directed to **UAB Procurement (205) 934-4515**.

All inquiries regarding payment of this LPO should be directed to the departmental contact name listed in the bottom right corner of this form.