

BEST PRACTICES FOR USING GRANT FUNDS WITH SCIQUEST

Principal Investigator:

- 1) Designate in writing the individuals authorized to charge each award for which you are PI. Review and update forms on a regular basis.
- 2) If **more than one** sponsored award will be used when ordering good(s) and/or service(s), define an allocation methodology in collaboration with the Business Office. This methodology should be documented, dated and signed by the PI and reviewed periodically or when the allocation method changes.

NOTE: An acceptable allocation methodology depends on your research and what is being purchased. It might be based on # of staff paid on each grant, modified total direct funding for each budget period for each grant, or related to some other cost which is already appropriately allocated, such as animal per diems.

Business Office:

- 1) Create VIP numbers to correspond with the specified funds for use with procurement applications. Review VIP numbers on a regular basis, delete those for closed awards and create new ones for new awards.
- 2) Obtain in writing from the PI those individuals authorized to charge specific awards. Keep this document on file in the business office and use it when you need to verify that a transaction Initiator is appropriate for a particular funding source. It is appropriate to review this periodically (e.g. when labor schedules are changed).
- 3) Assist departmental SciQuest users in loading authorized VIP numbers into their profiles.

SciQuest Requester/Preparer:

Before ordering, ask...

“who is the Initiator?”

“is the Initiator authorized to use the VIP accounts indicated?”

“will the goods or services being ordered be used on the sponsored award being charged?”

“are the correct VIP accounts in my drop-down list or do I need to add them?”

“should this order be charged to more than one award?” (e.g. if purchase will benefit more than one award)

During order checkout process, ask...

“is the fund allocation correct in the header and in the line item detail of the requisition?”

Helpful Hint:

If you are routinely ordering on behalf of multiple accounts, you may deselect the default VIP number to ensure that you are prompted to select the correct account on every order.

SciQuest Approver:

Verify that...

- Initiator is **authorized** to use the VIP account indicated and the Initiator is recorded on the SciQuest requisition.
- Ship to and charging instructions are **accurately** specified.

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- Funds are **available** and expenses are **allocated** properly.

Recommended Purchasing Practices with SciQuest:

- For **one-time purchases**, follow best practices on Page 1.
- For setting up a **purchase order with recurring invoices** (e.g. monthly charges for water service), use one of these options:
 - 1) Use the Standing Order form in SciQuest specifying a static allocation of charging instructions. This is ideal if accounts charged change infrequently.
 - 2) For standing orders where charging instructions change frequently (e.g. multiple grant accounts), use a paper requisition to Purchasing Services to request a DKP type purchase order. This will allow invoices to be sent to your department prior to payment for charging instructions.