



Policy Number: 1.2
Effective Date: 3/31/17

1.2 PURCHASING POLICY

A. Lawson Requisition Center

- Stock (CMS), Non-Stock, & Special Orders are all processed in the Requisition Center
- Requisitions can be submitted as needed without regard to vendor, item, or stock location
- Allow at least 2 days for your requisitions to be fully approved & processed
 - This timeframe may change depending on approval turnaround time, contract status, etc.
- **Stock Items**
 - Stock items are on the item master & housed in the CMS Storeroom
 - Stock item requests do not require approval
 - Stock items are noted with the green check mark & can be found in the Catalog as well as your custom stock template
- **Non-Stock Items**
 - Non-stock items are on the item master but not stocked in the storeroom
 - Non-stock items greater than \$1,000 on a line will be submitted to the Corporate Director of Supply Chain for approval automatically in Lawson.
 - The item will be released to Purchasing once approved
- **Special Order Items**
 - Special orders are not on the item master & must be manually entered on the Special/Service tab in RQC
 - Special orders should be used for one-time purchases.
 - Items should be submitted to Supply Chain if the department intends to order it regularly
 - Special orders will require approval from the department approver before Purchasing receives the requisition
 - The requisition will be submitted to Purchasing automatically if the requester is the department approver

B. Lawson Requisition Templates

- Additions & adjustments to requisition templates in Lawson can only be done through the Purchasing department
- Requests can be submitted to the Purchasing Manager at adam.delatte@uhsystem.com
- Custom stock templates will be updated as needed to mirror what is stocked in CMS

C. Department Requesters/Approver

- Departments are allowed two requesters & one approver per department



- Requester/approver access can be submitted to the Purchasing Manager at adam.delatte@uhsystem.com

D. Unapproved Requisitions

- Unapproved requisitions will be forwarded to the Purchasing Manager & Corporate Director of Supply Chain after 72 hours

E. Emergencies

- Emergency orders can be processed in Lawson same day but cannot be guaranteed for next day delivery due to vendor cutoff times
 - The department's corresponding buyer must be contacted & made aware of the emergency
 - Cardinal (distributor) must have the order in their system by 12:00 (CST)
- Departments must contact Purchasing for orders that need to be called in by the department
 - The department must reference the PO # with the vendor when it is placed

F. OR Materials Management

- Bill Only POs will be provided by the OR Materials Management office from the Manual PO range
 - Bill Only Manual Requisitions should be printed by OR Materials Management & submitted to the Purchasing office
 - The Manual PO # should be referenced on the paperwork
 - Bill Only requisitions will not require Admin approval
 - "ORB" should be listed as the buyer when submitting a Bill Only requisition to avoid being sourced to a PO in the PO100
- Pricing discrepancies between the bill only paper work submitted to OR Materials Management & Lawson will be submitted to Purchasing for review & resolution
- Bill Only buyer messages will be reviewed between the OR buyer & the bill only requester to resolve price, quantity, etc.

G. Receipts

- All tangible items must be received in Lawson by Receiving
 - There is no Do Not Receive option in Lawson
- The department must supply Receiving with a receipt if an item is picked up by the department or if an order bypasses the Receiving dock.
 - **No item is to leave the Receiving dock until it is received in Lawson**
- Materials Management will contact the department &/or vendor if a PO line shows on the MA236 report (Invoiced Not Received) for resolution

H. Equipment

- **NOTE:** Purchasing will review equipment requests \$4,500 & above since taxes & freight could push the amount over \$5,000
 - Finance/Budget can be contacted with any questions regarding taxes & add on costs that have equipment potentially close to the limit



- If Capital Request Form has not been submitted then the requisition will need to be cancelled & the Capital Request Form will be forwarded to the department for processing & approval
- If the Capital Request Form has been submitted & approved then the following instructions will need to be followed to process a Capital Equipment Purchase Order
 - **Accounting Unit/Account**
 - All Capital requests will be charged to accounting unit 0000 (Balance Sheet) & account 13700 (Asset Addition Clearing) unless stated otherwise by Finance/Budget
 - **Equipment Code**
 - Select Equipment Code “EQP” under the Header>Comment Code tab
 - This will make “DELIVER DIRECTLY TO BIOMED” show up on the receiving ticket
 - **Asset Template**
 - Add the corresponding Asset Template in PO20
 - This can be added in the “Asset Template” window under the “Activity, Asset Tab” in PO20
 - **Issue PO**
 - Add the CAP# to the PO comments & send a PO copy to the Corporate Director of Supply Chain
- I. New Departments**
 - The Accounting Department will notify the Purchasing Department of the formal name & accounting unit when a new University Health department is added.
 - The Purchasing Department will update Lawson for ordering & supply the new department with their requesting location.
 - The requesting location will be needed each time a requisition is submitted.
- J. New PO Range**
 - University Health Shreveport
 - 100000 – 499998
 - OR Manual Order
 - 60000-99999
 - University Health Conway
 - 500000-999998



K. Staff Contacts

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