

# UNIVERSITY OF LOUISIANA AT MONROE

## CENTRAL RECEIVING POLICY

4/02/2001

1. All expenditures for capital outlay purchases will be coded to a 7000 series expense code by the Purchasing department. Expenses that should be included in determining the total acquisition cost of movable property include:
  - a. base price/purchase price
  - b. freight and transportation costs
  - c. site preparation and installation costs
  - d. professional fees associated with installation and deployment

Each Purchase Order (PO) shall contain instructions to the vendor that a ULM purchase order number must be included on all shipping documents and invoices. Each PO should also include instructions to the vendor concerning delivery procedures as outlined below.

2. All items purchased with an expense code in the 7000 series and with a total acquisition cost of \$1,000 or more for any one included item will be delivered to the ULM Warehouse unless a specific direct delivery exception has been granted by the Property Control Manager (PCM) in writing. Exceptions can be granted on a standing basis to a specific department or college for certain types of property or on the basis of a delegated authority to a department-specific tagging system. Exceptions can be granted on a single case basis for items requiring special handling or installation by the vendor. Departments receiving items by direct delivery shall notify Property Control within three business days of receipt of any items requiring tagging, even if shipment is not complete.

While ordering departments can make "Direct Delivery" requests to the PCM, vendors must be informed by PO instruction that direct deliveries must be authorized by written permission from the PCM. Blanket exceptions issued by the PCM should be available both in the ordering department and vendor files. Vendor instructions should include a statement that ordering departments are not authorized to pick up from local vendors unless permission has been granted by the PCM.

3. Copies of all purchase orders coded to 7000 series expense codes and involving items with a total acquisition cost exceeding \$1,000 will be sent to Property Control by Purchasing within three working days after they are prepared. Unless delivery is on an exception basis, Property Control will provide copies to the ULM Warehouse as soon as possible, but certainly prior to the expected delivery date.
4. When equipment is delivered to the Warehouse, warehouse personnel will:
  - a. Pull the appropriate Purchase Order and verify that package/box identifications can be matched to the PO information, noting partial deliveries by package or box count. Notify the ordering department of shipment receipt. When partial deliveries are made to the Warehouse, notifications should be made immediately and the Purchase Order held in a suspense file until all packages are received.
  - b. If the packing is visibly damaged to the extent that contents are likely also to be damaged, Warehouse personnel shall refuse acceptance of the delivery unless

Purchasing or the ordering department is notified and approves acceptance. Merchandise is not to be unboxed nor taken out of its shipment packaging without the supervision of an ordering/receiving department representative or a Purchasing representative.

- c. Safeguard the condition and security of the shipment until it is delivered to or picked up by the ordering/receiving department.
  - d. Notify Property Control that equipment has been received. Identification shall be by Purchase Order Number. If delivery has been made without having a PO on file, Warehouse personnel shall inform both Purchasing and Property Control of receipt.
  - e. Complete a delivery ticket. One copy will be filed in Warehouse records, one copy will be given to the receiving department and one copy, along with a marked copy of the PO, will be given to Property Control. A copy of the purchase order and a copy of any external shipping or packing tickets should be kept on file in the Warehouse along with the delivery ticket. Original shipping/packing tickets shall be delivered with the equipment to be retained by the ordering department.
5. When Property Control is notified by the Warehouse that merchandise has been received and needs to be delivered and/or tagged, they will:
- a. Respond within two business days.
  - b. Contact the receiving department to make arrangements for tagging. The receiving department will determine with Property Control where and how the items will be removed from their shipping containers for tagging. Property must promptly be made available for tagging by the receiving department.
  - c. Record required information for property records. Assign a state property tag to items with a total acquisition cost of \$1,000 or more.
  - d. Mark the PO as having been partially processed or completed.
6. Departments with authorized direct delivery exceptions can have exceptions withdrawn at any time by the PCM if the need for special arrangements ceases or if the ordering/receiving department is not in compliance with university purchasing and property control procedures. The Controller's Office will notify and must receive approval from the PCM to process check writing requests for payment or reimbursement invoices involving movable property items exceeding \$1,000, regardless of funding source. Departments not completing their annual inventory certifications by an appropriate due date are subject to a PCM ordered suspension of purchasing authority until such certifications have been satisfactorily completed and submitted to Property Control.
7. These procedures apply to the acquisition of items of movable property in excess of \$1,000 of total acquisition cost regardless of funding source. Donated items cannot be considered State of Louisiana property nor the donation process considered complete until Property Control has been notified and tagging accomplished.
8. Property Control will make periodic surveys to check the efficiency and effectiveness of the Central Receiving process. Results from these surveys will be made available to appropriate Division and Department Heads.