

## How to Fill out and Submit a Credit Card Purchase Order

1. Go online and find what you need. Unfortunately, we cannot purchase from Amazon.com (I know, life's tough). If possible, try not to order one part at a time. The credit card purchase process is time consuming and it's preferable to keep the total number of orders to a minimum. Order multiple items in a single transaction whenever possible.
2. Once you've found what you need, call the vendor on the phone and get a quote. This is very easy. All you have to say is, "Hello, I'd like a quote." Most vendors are well acquainted with the ordering process, even if you aren't. This saves a lot of time in ordering because all the purchase card holder has to do is give the vendor the quote number instead of reading off the parts list. This way you're more likely to get the parts you ordered too!

If the website has terms and conditions for purchase, we must ask the vendor to waive them. Chances are, they've worked with government purchasers before and will know what you're talking about. If not, just ask, "Can you waive the terms and conditions of purchase? If so, please state that fact specifically on the quote." If they will not waive the terms and conditions, get a copy of them to include with the quote.

Be sure to request an estimated shipping charge to zip code 21402. DO NOT commit to purchase when requesting quotes.

The delivery address here at the Academy is:  
590 Holloway Rd.  
Annapolis, MD 21402

3. If you can't get a quote (please try!), be sure to save a screen capture for each of the products and of the check-out basket to make things easier on the purchase card holder.
4. Download the current purchase card form from the [USNA comptroller's website](#).
5. Fill in the purchase card order form as follows:
  - a. In the *Requested by* blank, include the name of the student requesting the purchase

- b. In the *Phone #* blank, include the cell phone number of the student requesting the purchase
  - c. In the *Date* blank, include the date the purchase request is sent to the TSD purchasing manager
  - d. In the *Merchant* blank, include the web address of the company from which you want to order (e.g. [www.mcmaster.com](http://www.mcmaster.com)).
  - e. In the *Point of Contact* blank, include the name of the person from whom you got the quote. For larger companies, employees often have an ID number. Please include this to ensure the purchase card holder can get back to the person who created the quote for you directly.
  - f. In the *Phone #* blank, include the point of contact's phone number, including his or her extension, or the company phone number
  - g. Under *CATALOG NUMBER AND COMPLETE DESCRIPTION OF ITEMS*, start with the product ID number and then include a description of the item (usually copied and pasted directly from the quote or website). Be sure to provide all pertinent details understanding that you won't likely be in the office when the purchase card holder sits down to make the purchase and any errors in ordering could cost valuable time. If additional lines are required, see attached pages.
  - h. Click the box next to *ITPR Required* or *HAZMAT* if either apply (additional paperwork required. See below).
  - i. Please include shipping charge, estimated by the company or website (not estimated by you).
  - j. We do not pay tax on purchases. If the vendor needs our tax exempt ID number, it's on the form.
6. **Faculty members**, additionally fill out:
- a. Under *Research \$\$ Only*:
    - i. Under *End use* write *CAPSTONE*
    - ii. Under *Whose money* describe the source (e.g. Boeing PBL, AFRL SADC, NAVSEA, PEO-IWS, etc.)
  - b. Under *Accounting Data: All others* → *Cost Code: 001616* \_\_\_ include your JON (e.g. ZPBBZ-11)
  - c. Back up under *Research \$\$ Only*:
    - i. Under *Signature for Account* insert your CAC and include your digital signature. You'll have to save the .pdf as a copy (*save as* will not save the additional information).

7. Save the purchase card order form and all other required items in your teams Purchase Orders and Budget folder (If you don't have one you need to create one and share it with your mentor!).
  - a. If there is a chance representatives from the comptroller's office might view a purchase as inappropriate (e.g. remote-controlled boats, bicycles, etc. - anything fun really), you may have to write a one-page justification memo explaining why you need this particular item and how you will use it.
  - b. Maximum allowed spending is \$2,999 per purchase order, including shipping charges. Orders cannot be split (e.g. \$5,000 worth of items, purchase from the same company, split between two orders, each totaling \$2,500) to accommodate the spending limit.
  - c. PAYPAL and other third party payments should be avoided. These are only to be used as a last resort.
  - d. Any order that includes an item that can provide input to or receive output from a computer must be accompanied with an ITPR smartform, also included in the course shared folder. You'll need help for this one. Ask.
  - e. HAZMAT purchases require the HAZTRAIN form be filled out and routed to the cardholder with the purchase order. A separate form is required for each line item on the purchase order (each HAZMAT item).
  - f. For HAZMAT purchases, please also supply the material safety data sheet (MSDS).

An example purchase card order can be found [here](#).

An example quote can be found [here](#).

8. Notify your team mentor that you have a purchase order ready to go.
9. Your team mentor will go into your team's folder and email the purchase order packet to the TSD purchasing manager who will assign your purchase to one of his or her purchase card holders. Be sure to include a .pdf of the quote. Team mentors should carbon-copy the students so they have visibility as to who is making the purchase for them.
10. Ideally, once the order is received the cardholder will notify the team purchaser that their items are ready for pick-up. However, **it is your responsibility to follow up on purchase orders**. Our purchase card holders process many, many orders. You have a vested interest in tracking the purchase. Be proactive!

**Note:** We cannot, under any circumstances, reimburse you for purchases. In order to expedite purchases students occasionally buy parts with their own money (though this is not required and is usually the result of poor planning!) but to be clear: in the event you pay out of your own pocket for something, we cannot pay you back out of project funds.