

### Procurement Process

1. **Requester/End User** must **obtain an estimate** from vendor. If you are purchasing items that are considered property (DOE Assets), please familiarize yourself with the Property Responsibilities at LBNL (<http://www.lbl.gov/Workplace/Property-Management/>).
2. **Create a requisition** - Fill out the ePRO Requisition Worksheet (Form No. EBPT2-1). Email the form with any supporting documentation to one of the two ePRO Inputters: **Valarie Espinoza-Ross** or **Peter Lau**, and CC the PI (and/or the appropriate approver) responsible for the Project ID order. The PI will respond to the requester **ONLY** if there is a question.
3. An e-mail will automatically be sent to the approver for **authorization**. Approver(s) must be on-site (LBNL) or have VPN access to log in and approve/deny the requisition. Note that the "comments" field will only be seen for a denied requisition.
4. A **Distributed Purchasing Unit** will assign an appropriate Buyer or reassign a "name dropped" Buyer.
5. The Buyer is the **ONLY PERSON** who can make purchases and changes to a procurement. The Requester/End User must work with the Buyer **NOT** with the vendor. Additional approvals may be required and must be documented via email if changes to the order exceed ~10%.
6. When your order arrives, **Receiving** will log it into the system before delivery. Receiving will keep the original packing slips and you will be issued an internal LBNL packing slip. It is the Requester/End User's responsibility to check the order against this slip/receipt for accuracy.
7. **Returns, repairs, evaluations (changes to the shipment)** must be directed back to the original Buyer. Contact the Procurement Help Desk x7774 for any questions regarding your order (incomplete, incorrect, or returns). **DO NOT ship any LBNL property without a LBNL Shipping Document!**

### General Approval Process

Remember to discuss your procurements with the appropriate PI and/or Program Head. For any changes in the approval line, please inform the inputter so that it can be documented in the ePRO system comments field or via email.

- Purchases up to \$10,000 - Approved by the **PI** of the project ID being charged. In cases when the PI is not available/absent, the *Business Manager* or the appropriate *Program Head* is authorized to approve.
- Purchases >\$10,000 but < \$50,000 - Approved by the **appropriate Program Head**. In cases when the Program Head is not available/absent, the *Division Director* will approve.
- Purchases >\$50,000 - Approved by the **Division Director**. In cases when the Division Director is absent, the Division Director's assigned *designee* will approve.

Because all orders go through a Distributed Purchasing Unit and then assigned to appropriate Buyers, please allow enough time for your order to be processed.

For a complete description of these and all other policies, please refer to the LBNL RPM at <http://www.lbl.gov/Workplace/RPM/>, or contact Maryann Villavert, ESD Business Manager. 510/486-7357, [mvillavert@lbl.gov](mailto:mvillavert@lbl.gov).

For complete information go to Berkeley Lab Procurement (<http://purch1.lbl.gov/>) or ESD Business Practices: Procurement ([http://www-esd.lbl.gov/workplace\\_resources/business\\_practices/procurement.html](http://www-esd.lbl.gov/workplace_resources/business_practices/procurement.html))