TO: Deans, Directors, and Department Heads

FROM: Tony Burger, Director of Financial Analysis and Procurement Services

DATE: 04/2021

SUBJECT: Temporary Exception Process for Shipping Items to Non-University Addresses

Due to the impact of COVID-19, Procurement Services will temporarily allow units to approve shipping exceptions for delivery of items to non-university addresses to support teaching, research, and learning, as well as a remote workforce. Units will be responsible for reviewing, approving, and documenting all shipping exception requests under $10,000 that are sent to a non-university address. Additional approval from Procurement Services will not be required for these purchases.

Approved buying methods for shipping to non-university addresses:

- Marketsite should be used to deliver to non-university addresses through Procurement Services (formerly handled by Tech Shop) for CDWg and B&H catalogs only.
- For small dollar and miscellaneous purchases, PCards (preferred) and personal credit card reimbursements are an allowable alternative. Please be aware that PCards still have a $5,000 transaction limit.

Procurement processes that remain unchanged by this policy:

- Any purchases of $10,000 or more must follow the existing procurement process for competitive bidding.
- ePro Requisitions cannot be used to ship to non-university addresses.
- Marketsite catalog orders cannot be used to ship to non-university addresses, except for CDWg and B&H which are coordinated through Tech Shop.
- Purchases of restricted commodities cannot be shipped to non-university addresses and must follow established procurement guidelines.
- Policies for purchasing with sponsored funds.

Please attach this message when submitting your expenses in Concur. In addition, units must maintain supporting documentation of all items shipped to home addresses. Units are responsible for monitoring activity through existing management reports:

- MGMT Reports website (including training + access info)
- MGMT Report: Procurement Spend (by Pcard holder, Supplier, etc.)
- Additionally, the SSC SOA team can be utilized for error research and resolution if charges require additional information or correction (SOAreconciliation@umich.edu)

This policy exception will be reviewed at the end of the semester, 08/27/2021.