



Executive Vice Chancellor and Provost  
Vice Chancellor for Finance and Administration  
and  
Vice Chancellor for Research and Innovation

Holladay Hall  
Raleigh, NC 27695

## MEMORANDUM

TO: Vice Chancellors and Deans

FROM: Warwick A. Arden, Executive Vice Chancellor and Provost  
Charles A. Maimone, Vice Chancellor, Finance and Administration  
Mladen A. Vouk, Vice Chancellor, Research and Innovation

SUBJECT: Guidelines for Purchasing Exceptions

DATE: March 31, 2020

### Scope

Due to the Covid-19 pandemic (spring 2020) and resulting impact to campus operations, an exception process to the university's standard shipping process of goods and supplies to official university addresses is outlined below. At this point, the university remains open and Central Receiving is fully operational. Therefore, exceptions to the standard process should be limited and restricted to research or instructional support conditions that cannot be managed under the university's standard delivery process. This exception process expires on April 30, 2020 and may be revoked, adjusted and/or continued at any time as deemed appropriate by the Provost, the Vice Chancellor, Finance and Administration, and the Vice Chancellor, Research and Innovation.

### Standard Shipping Process

NC State's standard shipping best practice is to ship university goods and supplies to official university addresses. Delivery drivers are aware that campus buildings have entry signs posted with names and phone numbers listed for receiving. As long as the campus is operational, packages can be delivered directly to campus buildings. If drivers are unable to connect, deliveries can be re-routed to Central Receiving at the Materials Support Warehouse. Central Receiving is fully operational, has both freezers and refrigerators for short-term storage of lab and clinical supplies, and continues to deliver to university addresses. Additionally, university employees are welcome to drive to Central Receiving for curbside pick-up of deliveries (Central Receiving staff will take deliveries to university personnel waiting in cars). Please bring your campus ID with you, when picking up packages. Central Receiving is located at the Materials Support Warehouse (3240 Ligon Street).

### Shipping Address Exception Process

During this time of limited campus operations and remote work, there may be exceptional circumstances that justify the temporary addition of other addresses to the list of official university addresses. Adding non-university addresses will be limited, and restricted to research or instructional support conditions that cannot be managed under our current delivery process. Exceptions must be approved by the Provost or the Vice Chancellor, Research and Innovation.

### **Step 1: Approval by Unit Leaders**

Requests for deliveries to non-university addresses should be approved by unit leaders prior to approvals centrally. All requests should come from faculty and be addressed to either the Associate Dean for Research (ADR) for research-related requests or the Associate Dean for Academic Affairs (ADA) for instructional-related requests. The ADR or ADA will decide whether individual requests should be considered and routed for approval. Please provide a memo with the following:

- a. College and Department initiating the request,
- b. PI name (research-related) or Instructor name (instructional-related),
- c. PI or Instructor phone number,
- d. PI or Instructor email address,
- e. If a research-related request, provide project title,
- f. If an instructional-related request, provide course title and number,
- g. Proposed funding source (project id),
- h. Approximate cost of item(s),
- i. Rationale for delivery of this item to a non-university address (be as complete as possible),
- j. Indication if the order is a MarketPlace order or a Requisition Order,
- k. Proposed non-university address for delivery,
- l. The name and signature of the Associate Dean who will review and approve the request.

### **Step 2: Approval by Office of Research and Innovation (ORI) or Provost's Office**

Once approved at the unit level, the requests should be forwarded to the appropriate email address:

- a. **Research-related requests:** [research-delivery@ncsu.edu](mailto:research-delivery@ncsu.edu)
- b. **Instructional-related requests:** [instruction-delivery@ncsu.edu](mailto:instruction-delivery@ncsu.edu)

### **Step 3: Approval Confirmation**

Once approved by the Office of Research and Innovation or the Provost's Office, an approval memo will be sent to the faculty/staff requesting approval and the ADR/ADA/Unit Leader. This memo will indicate what is being approved and under what conditions (e.g., one or a series of orders for a given project/course has been approved through April 30, 2020).

### **Step 4: Entering the Address into the Financial System**

Once the approval memo is received, please:

- a. Send an email to the OIT help desk ticket routing system, Service Now: [help@ncsu.edu](mailto:help@ncsu.edu) with the Subject line: **Temporary location code addition,**
- b. Attach/upload the approval memo,
- c. Include the physical street address, city, state and zip,
- d. Include the name of the person receiving the shipment(s).

### **Step 5: Process Complete**

An email confirming that the address is ready for use with MarketPlace orders and requisitions will be sent to the faculty/staff initiating the request and the ADA/ADR/Unit Leader included in the approval memo.

### **Placing an Order**

Once approved, these addresses will be temporarily added to the financial system. Please note the use of alternative addresses for purchasing exceptions will only be possible through the use of MarketPlace or financial system requisitions. These orders will then route for approval using the established financial system approval workflow. The temporary addresses will be removed from the financial system at the end of this period of impacted campus operations. The authorized purchasers and their approvers remain responsible for ensuring they meet university purchasing policy and guidelines.

### **Questions**

If you have questions about the purchasing of items, the use of MarketPlace, or financial system requisitions, please contact Sharon Loosman, Director of Procurement and Business Services at ([sdloosma@ncsu.edu](mailto:sdloosma@ncsu.edu) or 919.513.4206).

If you have questions about the approval process, please contact Genevieve Garland, Assistant Vice Chancellor for Research Operations and Communications and Chief of Staff, Office of Research and Innovation ([gmlawren@ncsu.edu](mailto:gmlawren@ncsu.edu) or 919.513.6010) for research-related exceptions. Contact Adrian Day, Assistant Vice Provost for Finance and Planning, Office of the Provost ([ajday@ncsu.edu](mailto:ajday@ncsu.edu) or 919.515.1148) for instructional-related exceptions.

cc: Adrian Day, Assistant Vice Provost, Finance and Planning, Office of the Provost  
Genevieve Garland, Assistant Vice Chancellor, Research Operations and Communications and Chief of Staff, Office of Research and Innovation  
Jonathan Horowitz, Associate Vice Chancellor, Research Infrastructure and Development, Office of Research and Innovation  
Lori Johnson, University Controller, University Controller's Office, Finance Division  
Sharon Loosman, Director, Procurement and Business Services, Finance Division  
Mary Peloquin-Dodd, Associate Vice Chancellor, Finance and University Treasurer, Finance and Administration