

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

BCOM ORSP Research Account Purchasing		SOP #: RSP.008.01
Effective Date	10/23/19	
Last Revision/Review	10/23/19, 11/30/2021, 4/1/2023	

1. Purpose

The purpose of this policy is to define the procedure whereby a Burrell College Principal Investigator or designee places orders for items funded by a sponsored award, intramural research fund, or research fund administered through the Southwest Foundation for Osteopathic Education & Research (SWFOER).

2. Related Policy/Authority

Office of Research & Sponsored Programs
Burrell College Finance & Administration

3. Faculty/Staff Responsibilities

- 3.1 Grants Awarded to Burrell:** Upon receipt of award notification by the Principal Investigator, the P.I. will notify ORSP and provide a copy of the award notice. ORSP will coordinate the establishment of an account number with the Burrell College Office of Finance.
- 3.2 Southwest Foundation for Osteopathic Research and Education (SWFOER) Accounts:**
Investigators wishing to establish a research fund under SWFOER should meet with the Assistant Dean for Research to discuss the establishment of a fund within the Foundation. The Office of Research and Sponsored Programs will coordinate the establishment of an investigator research fund with the Southwest Foundation for Osteopathic Education and Research.
- 3.3 Initiating of Purchasing Requisition:** The Principal Investigator or approved designee is responsible for initiating the request. The request is submitted to ORSP for processing.
- 3.4 Requisition Processing:** The Office of Research & Sponsored Program is responsible for logging and reviewing the request from a compliance perspective, and for submitting the requisition to Burrell's accounting software for processing. . The Office of Research or Office of Finance will place the order and process forward.
- 3.5 Account Management:**
- 3.5.1 SWFOER Research Accounts:** The Burrell College Office of Finance will provide monthly invoices to the Accounting Offices of Beasley & Associates to cover the costs of the goods or services covered by the Office of Finance.
 - 3.5.2 Monthly Statements:** The Office of Finance will provide monthly transaction statements to the Office of Research & Sponsored Program. ORSP will reconcile monthly transaction statements as necessary and provide the Principal Investigator with a monthly statement.

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4. Definitions/Abbreviations

- 4.1 Discretionary Fund:** a reserve of money that can be used for a variety of purposes defined by the fund manager. At Burrell College discretionary funds may be required to conform to general purchasing policies and procedures.
- 4.2 Intramural Research Fund:** a Burrell College funded research account that is tied to the ORSP budget.
- 4.3 Restricted Fund:** a reserve of money that can only be used for specific purposes.
- 4.4 Sponsored Award:** funding from an external entity such as a private foundation, corporation, or government agency for an activity of defined scope and purpose. Sponsored Awards for the purpose of this definition include Extramural Grants (EG), Extramural Contracts (EC).
- 4.5 SWFOER:** Southwest Foundation for Osteopathic Education and Research

5. Procedural Steps

- 5.1 Assignment of Tracking Number:** Upon notification of receipt of intent to apply for extramural funding, the Office of Research & Sponsored Programs will assign a tracking number that will be used for tracking the activities related to the sponsored award or fund.
- 5.2 Assignment of Account Number:** The Account Number will be assigned by the Burrell College Office of Finance and will be communicated to the Office of Research & Sponsored Programs. ORSP will communicate this information to Principal Investigator.
- 5.3 Creation of MS Teams Channel:** The ORSP will establish an MS Teams Channel for communication with the investigator. The Teams site will become a site for dialog regarding the budget and account activities.
- 5.4 Initiation of Requests:** The Principal Investigator or approved designee is responsible for initiating the request. The request must be submitted through the ORSP Order Request system and attach a copy of an appropriate quotation from the vendor. The request must be approved by the Principal Investigator or an individual designated by the Principal Investigator with purchasing authority on the account. The approved order request and associated quote shall be submitted to the Office of Research & Sponsored Programs through the ORSP Order Request system.
- 5.5 Office of Research & Sponsored Programs Actions:** The Office of Research & Sponsored Programs downloads the ORSP Product Order excel sheet upon receipt and reviews the request to ensure sponsored program compliance and fund availability. Upon completion of the review, the request will be submitted as a purchase requisition onto Burrell's accounting software for processing within three business days.

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5.6 Burrell College Office of Finance: Upon receipt of the purchase requisition, Office of Finance will review the purchase requisition for accuracy. ORSP will place the order once approved.. Any questions regarding the requisition will be directed to Burrell ORSP.

5.7 .

5.8 Office of Research & Sponsored Programs: : Upon receipt of order, ORSP will make sure that the items shipped match the items indicated on the packing list. ORSP will receive the items and submit a copy of the packing list and submit to the Office of Finance.

6. Reports/Charts/Forms/Attachments/Cross References

Burrell College Purchase Requisition

7. Maintenance

Office of Research and Sponsored Program; reviewed annually

8. Signature

Signature on File

4/1/2023

Assistant Dean for Research

Date

9. Distribution List

Internal

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/ Replacement Procedure? (if applicable)	Approval Date
1	[e.g., 3.1]			
11/30/2021		Removed reference to BCOM and replaced with Burrell College		12.6.2021
11/30/2021	5	Updated process to align with current requisition purchasing processes.		12.6.2021