

Advanced Photon Source

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| Procedure #: | 3.1.23 |
| Revision #: | 3 |
| Issue Date: | 1/9/13 |
| Review Period: | 1 year |
| Supersedes: | Rev. 2, 9/27/11 |
| Last Reviewed: | 1/9/13 |

Establishing and Maintaining Nonproprietary APS User Accounts

Changes made in this revision:

- Updated title of reviewer
- Updated capital equipment unit price in Policy section
- Updated town in Procedure section

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APS_1186766

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Establishing and Maintaining Nonproprietary APS User Accounts

Note: for information on establishing accounts to cover charges associated with proprietary research at the APS, see [Establishing and Maintaining Proprietary APS User Accounts](#).

1 POLICY

1. Each APS User institution must have a valid APS User Account number to initiate requests to the APS for reimbursable items and services. Listed below are some examples of reimbursables:
 - Beamline components purchased through or fabricated by the APS for installation outside the shield wall.
 - Stockroom purchases.
 - Telephone service.
 - Trade/craft work by Argonne employees or Argonne subcontractors.
 - Employees hired by the APS and assigned to a beamline to perform scientific or technical work for the beamline.
 - LOM charges (i.e., building/utility/custodial charges associated with occupancy of APS Laboratory/Office Modules).
2. The U.S. Department of Energy (DOE) requires advance payment from APS users for some types of reimbursables, e.g., capital equipment and capital construction, except as noted in the next paragraph. (“Capital equipment” means equipment items having a unit price of \$500,000 or more and a useful life of two years or more.)
3. Advance payment is not required if the APS User institution making the purchase is using DOE funds.

2 PROCEDURE

The APS User Account Specialist is
Deana Kinzler
Advanced Photon Source--Bldg. 401
Argonne National Laboratory
9700 South Cass Avenue
Lemont, IL 60439
Phone: (630) 252-1244
Fax: (630) 252-3222
E-mail: useracct@aps.anl.gov

1. An appropriate User representative contacts the APS User Account Specialist at the above address. The User representative provides whatever information is relevant to

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setting up the account(s), such as a list of the items to be procured, sources of funds, and scheduling requirements. If necessary, this information is used to develop a written plan. If the User intends to purchase APS standard components, the components and quantities are identified in the plan. The plan, copies of which are distributed to all parties, serves as a framework for implementation of the steps listed below.

2. The User submits a Purchase Order (PO) to Argonne National Laboratory (Argonne) in care of the APS User Account Specialist. The PO must include the following information:

- A statement that the purpose of the PO is to establish an APS User Account for [the name of institution].
- The category of purchases covered by the PO. A given PO may cover only one of the following three categories: (1) construction activities; (2) materials, supplies, and services; or (3) capital equipment. (At the discretion of the User, the PO may include a detailed description of the desired items or services.)
- The starting and expiration date of the PO, with options to extend the term of the PO, if applicable.
- The name of the “Account Contact” to whom account information should be reported.
- The addressee for Argonne invoices, if different from the Account Contact.
- A list of individuals authorized to sign requests for equipment, materials, etc., under the PO. (Note: signatures of authorized individuals will be honored up to the dollar limit of the PO.)
- The estimated value of the PO, based upon the User’s expectations of the total value of the items and/or services to be purchased during the term of the PO, including applicable overhead charges. Information on provisional overhead rates is available from the APS User Account Specialist.

If the PO is for construction activities or capital equipment and the User is financing the PO with DOE funds, the User encloses appropriate documentation (e.g., a copy of the relevant DOE contract) with the PO to show that sufficient DOE funds are available to cover the purchase.

3. The APS accepts the PO by sending the Purchasing Agent or Account Contact an “Acknowledgment of Purchase Order” for signature. Execution of the Acknowledgment activates the User Account and establishes the terms for its use. The Account Contact is informed of the procedures for charging purchases against the account, the provisional overhead rates that are currently in effect, and (if applicable) advance payment requirements. When advance payment is required, the User provides it by means of a check payable in U.S. dollars.
4. The Account Contact promptly notifies the APS User Account Specialist in writing of any subsequent changes to the list of authorized signatures, and the APS modifies the Acknowledgment accordingly.
5. Whenever Argonne adjusts its provisional rates to actual rates, the User account will be charged or credited accordingly.

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6. In cases where advance payment is not required, Argonne bills the User monthly, in accordance with Argonne Accounts Receivable billing procedures; each bill is accompanied by an itemized report of the charges.
7. The APS User Account Specialist monitors the account with respect to termination date, dollar ceiling, signature authority list, etc., and notifies the Account Contact one to three months before the expiration date of the PO, or when 80% of the authorized amount has been spent or committed.
8. If the account limit is exceeded, Argonne will close the account until the initiating PO is revised or a new PO is submitted.
9. **Invoice payment terms are net 30 days.** Payments must be made in U.S. dollars. Argonne follows up on unpaid accounts every 30 days. Invoices unpaid after 30 days are assessed late charges, per DOE mandate. Late charges include interest, administrative costs for collection, and (if still unpaid after 120 days) penalties. In addition, if invoices are unpaid after 60 days, Argonne work may be suspended until the delinquency is removed.

3 FEEDBACK AND IMPROVEMENT

If you are using this procedure and have comments or suggested improvements for it, please go to the [APS Policies and Procedures Comment Form](#)^{*} to submit your input to a Procedure Administrator. If you are reviewing this procedure in workflow, your input must be entered in the comment box when you approve or reject the procedure.

Instructions for execution-time modifications to a policy/procedure can be found in the following document: Field Modification of APS Policy/Procedure ([APS_1408152](#)).

^{*} http://centraldocs.aps.anl.gov/comment_form.php