

# Department of Plant Pathology

## Which Order Form Do I Use??

*All you wanted to know about Department order forms  
but were afraid to ask*

- Forms discussed: ProCard Voucher, Direct Order Request, Supplemental Order Form, and Employee Reimbursement Form.
- All forms are available in a PDF e-form format that can be filled in at your computer and signed digitally. These files are available on the department website (Internal Page tab, <http://plantpathology.ca.uky.edu/forms>).
- Print copies are available outside room 201E.



# Direct Order Request Form

## Plant Pathology - Direct Order Request

Incomplete forms may be returned or result in order delays!

Part I: Authorization & General Order Information	
<b>Date</b>	<b>Requested by</b>
<b>Account #</b>	<b>Account PI</b> <small>(signature required)</small>
<b>SIO #</b> (if required)	<b>Business Officer</b> <small>(signature required)</small>
Form rec'd (office)	<b>Additional Approver</b> <small>(signature; when required)</small>
<b>Vendor</b> <small>(check one)</small>	<input type="checkbox"/> B&H Photo <input type="checkbox"/> Grainger <input type="checkbox"/> UK Supply Center (Stores) <input type="checkbox"/> Bio-Rad <input type="checkbox"/> Life Technologies <input type="checkbox"/> VWR <input type="checkbox"/> CDW-G <input type="checkbox"/> Office Depot <input type="checkbox"/> Other: _____ <input type="checkbox"/> Dell <input type="checkbox"/> Qiagen <input type="checkbox"/> Fisher Scientific <input type="checkbox"/> Sigma
<b>Quote / Promo #</b> <small>(attach quote document)</small>	<input type="checkbox"/> Pay only
<b>Business Purpose</b> <small>(Be brief, but specific)</small>	

Part II: Product Information					
Product #	Item Description	Qty	Unit <sup>1</sup>	Unit Price	Extended Price
<sup>1</sup> Indicate unit as: each (ea), pack (pk), case (cs), box (bx) etc. Form: 7/5/24				<b>Order Total*</b>	0.00

\*Indicate approximate order total

For office use only

Date ordered: \_\_\_\_\_

Cart number: \_\_\_\_\_

## Purpose

To order items from a UK contract vendor punch-out catalog or process an order/payment to a vendor that requires a University Purchase Order (and will not accept a ProCard). These orders must be placed by office staff.

## Procedure

- Fill in all authorization and general order information in Part 1.
- Select the vendor name in the list of UK punch-out catalogs or fill in the vendor name after Other.
- Add a quote or promo number, if there is one.
- If the request is for payment only, check the Pay Only box.
- Business purpose should be brief, but specific. For example, refer to the applicable research project. Do not just state "for lab research" or "for field work" as that is too general and vague.
- List the details of the items to be purchased in Part 2. Be sure item numbers are correct and pricing is up-to-date. If you have a quote, list a general item description and refer to the quote for details.
- Enter one of the following for Unit: ea (each), pkg (package), bx (box), or cs (case).
- Include pricing. Order total will automatically calculate in the Extended Price column.
- Signatures required prior to submission: Account PI (Plant Path faculty). An Additional Approver signature will be needed in some situations, such as when the primary PI on the funding source is in a different department; they should sign.
- Send the completed form, along with any supplemental documents (e.g., quote) to Cheryl in an e-mail; send each order in a separate e-mail. Office staff will process the order form.



# Employee Reimbursement Form

Clear Form

**UK** UNIVERSITY OF KENTUCKY  
Request for Employee Reimbursement and Invoice(Other than Travel Expenses)

Employee / Account Information	Department Information
Name:	Dept. Name: Plant Pathology
Address 1:	Contact Person: Cheryl Kaiser
Address 2:	Address 1:201F Plant Science Bldg
City/State/Zip:	Address 2: 1405 Veterans Drive
Business officer approval:	Phone #: 859-218-1289
Account #:	Email: cakaiser@uky.edu

Date of Expense	Please provide a detailed description of the business purpose of each expense, provide a complete explanation of why personal funds were used in lieu of the standard University procurement process (Procurement Card, Purchase Order or PRD) and attach an itemized receipt for each expense listed.	Amount
Total Reimbursement Amount		

I certify that the expenses listed above were incurred on behalf and exclusively for the benefits and business purpose of the University of Kentucky.

Employee's Signature \_\_\_\_\_ Date \_\_\_\_\_

Approving Official \_\_\_\_\_ Date \_\_\_\_\_

To select the appropriate method for reimbursement, (SRM Requisition/Purchase Order or Payment Request Document) please refer to the Purchasing/AP Quick Reference Guide.  
<http://www.uky.edu/Purchasing/docs/quickrefguide.pdf>

For Reimbursement by SAP/SRM Requisition/Purchase Order: Step 1.) Prepare a SRM Requisition. Step 2.) Complete a Vendor Invoice and Credit Memo Transmittal.  
<http://www.uky.edu/eForms/forms/vendtrans-sap.pdf> (Attach this form and transmit to Accounts Payable.)

For Reimbursement by Payment Request Document (PRD) this form must be attached to the PRD as part of the supporting documentation.  
<http://www.uky.edu/Purchasing/docs/quickrefguide.pdf>

## Purpose

To reimburse UK employees for non-travel business expenses paid with their personal funds.

## Note

Employees planning to use personal funds for a purchase should first confer with a staff member before making the purchase to first make sure the purchase is in compliance with UK.

## Procedure

1. Fill in your name and the address for your residence in the Employee/Account information section.
2. Department Information will be completed by the office staff member processing the request.
3. List each reimbursable expense separately, including the date of the expense, amount of each item, and the total requested. If you have more than three expenditures, use a second form.
4. Provide an explanation as to why a ProCard was not used.
5. You must have a receipt for each expense
6. Employee should sign and date.
7. Employee supervisor will sign as the Approving Official.
8. Submit the completed form with approval signature, along with receipt(s), to Cheryl.
9. Office staff will process the request.