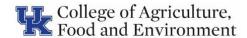
Department of Plant Pathology

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.

ProCard Voucher



STEP 1: BASIC PURCHASE INFO

Today's Date

PROCARD VOUCHER

Plant Pathology

Cardholder Signature:					
Purchaser Name:					
Additional Approver:					
formation when ordering multiple items.					
Business Purpose: Brief, but specific description of purpose for expenditure.					
If for travel, include the following: Full meeting name, meeting location & dates of travel. Attach a copy of the travel authorization.					
STEP 2b: APPROVAL SIGNATURES					
- I I I I I I I I I I I I I I I I I I I					
Purchaser Signature Date					
- Dunkands Summing (as Balanta) Simakun Bak					
e Purchaser's Supervisor (or Delegate) Signature Date					
- ofo					

Cardholder Name:

	[44.4	CLC	e is for Office Staff Use Only)
41	Expense Acct # (CC or WBS)	\$\$ Amount \$\$	GL Code	Expense Type
7				
」 │				
Account(s) Requeste				
Account(s) Requeste				
7				
4				
SIO # (if required)				
310 # (Il required)				
-				
4-1-14				
\$ Order Total \$				
_				
7				
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Purpose

To purchase/pay for items from vendors that accept a ProCard (credit card). ProCard orders are now placed by the cardholder or their lab staff.

- 1. Add date, vendor name, phone (optional), cardholder name, and purchaser name in Step 1. "Form rec'd" is for office staff use only.
- 2. Fill in the item being purchased or type of expense. Use a supplemental order form as needed (see page 4).
- 3. 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.
- 4. In the case of travel expenses, the full meeting name, location, and dates of travel must be included on the form. If the expense is for someone other than the cardholder, include their name(s).
- 5. Fill in the dollar amount and account number on the right in Step 3. Add the SIO number, if applicable.
- Signatures required: cardholder (Step 1), purchaser & supervisor (Step 2b). In some cases, one person may fulfill multiple positions and need to sign in more than one place.
- 7. 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.
- If the order total is over \$1,000, the cardholder's supervisor should sign the form digitally in advance of incurring the expense (Step 2a).

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 Date Requested by Account PI Account # (signature required) **Business Officer** SIO # (if required) (signature required) Additional Approver Form rec'd (office) (signature: when required) B&H Photo UK Supply Center (Stores) Grainger Bio-Rad Life Technologies າ∨wr CDW-G Vendor Office Depot Other: (check one) Dell Qiagen Fisher Scientific Sigma Quote / Promo # Pay only (attach quote documer **Business Purpose** (Be brief, but specific) Part II: Product Information Unit1 **Extended Price** Product # Item Description Unit Price Indicate unit as: each (ea), pack (pk), case (cs), box (bx) etc Order Total* 0.00 Form: 7/5/24 *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.

- 1. Fill in all authorization and general order information in Part 1.
- 2. Select the vendor name in the list of UK punch-out catalogs or fill in the vendor name after Other.
- 3. Add a quote or promo number, if there is one.
- 4. If the request is for payment only, check the Pay Only box.
- 5. 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.
- 6. 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.
- 7. Enter one of the following for Unit: ea (each), pkg (package), bx (box), or cs (case).
- 8. Include pricing. Order total will automatically calculate in the Extended Price column.
- 9. 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.
- 10. 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.

Supplemental Order Form

Supplemental Order Form*

Plant Pathology Department

*This form must be accompanied by a ProCard Voucher or a Direct Order Request form

Vendor Information		
Vendor		
Vendor website		
Vendor phone		
Quote/Promo		

	Order Information				
Item#	Description	Qty	Unit	Unit Price	Extended Price
	2				
				3	
				Total	0.00
Form: 01/31/19	_		9	Shipping	

Shipping
Order TOTAL
0.00

Purpose

To use as a supplemental order form to accompany a ProCard Voucher or Direct Order Request form.

Note

This form should never be submitted or used without a ProCard voucher or Direct Order Request form.

- 1. Fill in the vendor name. Other vendor information is optional.
- List the details of the items to be purchased.
 Be sure item numbers are correct and pricing is up-to-date.
- 3. Enter quantity and one of the following for Unit: ea (each), pkg (package), bx (box), or cs (case).
- 4. Order total will automatically calculate in the Extended Price column.
- 5. If this is a supplementary to a direct order request form, be sure to submit it with the DOR.

Employee Reimbursement Form

Clear Form

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.

mployee's Signature	Date		
pproving 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 tranmit 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.ukv.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.

- 1. Fill in your name and the address for your residence in the Employee/Account information section.
- 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.
- Submit the completed form with approval signature, along with receipt(s), to Cheryl.
- 9. Office staff will process the request.