College of Education Payment and Purchase Request Processing Instructions for Department/unit Business Officer

Quick Reference Guide

This Quick Reference Guide is for when someone else creates a request for your department. If you are creating a new request from scratch, please use the "COE – Purchasing and Payment Request Create Instructions"

1. You will receive an email alerting you that someone in your department has created a New Purchase Request:

    SAC

    Requested by Service Account, COE Automate <svc_coeautomate@uky.edu>

    ## Purchase Form Approval Needed

    Epps, Michael at 2021-12-09T17:28:28Z

    Link: Purchase Form

    Date Created: Thursday, December 9, 2021 8:30 PM GMT

    | Approve | Reject |

    You can also see any pending requests that need your review on the Teams Activity page

2. Click on the Purchase Form Link to take you to the Form
3. Click on the Edit all button to make changes

    ✏ Edit all

    College of E… > Purchase R… > **Purchase Form**

    ID   119
                            Requestor

4. Add information/edit and attach files as needed
5. Add Notes: If you enter items in the Notes section, please make sure all notes are in the format MM/DD/YY Initials: Note with the newest note at the top. This helps ensure the most recent notes can be seen first and the older ones can be scrolled to.

PI or Other Approver(s)   Find items ⌄

Notes

03/02/22 ME: Please make sure all notes are in the format MM/DD/YY Initials: Note with the newest note at the top. This helps ensure the most recent notes can be seen first and the older ones can be scrolled to.

02/28/22 AT: Please make sure all notes are in the format MM/DD/YY Initials: Note with the newest note at the top. This helps ensure the

6. Click Save
7. Go back to the email or Teams Activity page
8. Approve or Reject as appropriate. For additional information on how to Approve or Reject, please see the document "COE – Purchasing and Payment Request Approval Instructions"
9. You should track the progress of the order using the steps outlined in the document "COE – P and P Request – Additional Tips"
10. If approvals are not done within 30 days of the PPRF creation, the request will time out and a new PPRF will need to be created. Please track the progress of the Request and follow up if the approvals are not happening in a timely manner.