University of Kentucky
College of Education

College of Education Payment and Purchase Request Form – Additional Tips

Workflow entry guidelines:

Type of Payment/Purchse	Enter into Payment/Purchase Workflow	Enter in Concur	SAG Form	Refer to HR	Send copies of all paperwork to Financial Analyst
Commodity Purchase	✓				✓
Registration	✓				
Hotel	✓				
Airline	✓				
Mileage		✓			
Per Diem		✓			
Student Payments (non-employees)	✓				✓
Student Payments (employee)				✓	✓
Student Payments (sholarships, grants, tuition waivers) *see E-7-14*			✓		✓
Univeristy Internal Charges (ex: UKY stores receipts, monthly postal charge slips)					✓

Steps of Review and Approval

1. Creator - submits request form (the chart below indicates who will receive the request once it is submitted, based on the department selected)

Dept #	Name	1st level review	1st level approver
8G000	Administration/Office of the Dean	Julie Meade	Shelli Hilton
8G002	NetGen	Jenny Holly	Karen Perry
8G010	EDL	Courtney McCord	Justin Bathon
8G020	EDC	DeAna Thompson	Jonathan Thomas
8G030	EDP	Cordell Costar	Laurie McCubbin
8G040	KHP	Beth Graham/Dianna Kidd	Heather Erwin
8G050	STEM	Cordell Costar	Jonathan Thomas
8G060	EPE/Evaluation Center/Civil Rights Institute	Monica Justice	Meghan Pifer
8G070	EDSCE	Hollie Holladay	Melinda Auldt
8G071		Hollie Holladay	Melinda Auldt
8G250	Center for Professional Developmet	Financial Analysts	Kenneth Tyler
8G300	Education Teacher Education & center	Ted Nilsson	Margaret Rintamaa
8G310	Education Instruction, Media & Tech	Financial Analysts	Shelli Hilton
8G320	Education Lab Experiences	Ted Nilsson	Amy Spriggs
8G330	Office of Research	Beth Eaves	Melinda Ickes

note: The 2nd level review will always be the Financial Analyst. Additional levls of approval are based on entries in the Additional Approval field and will occur in the order they are entered when creating the order. The final level of approval will always be the Dean of Finance (currently April Lyons)

2. College Business Officer – can edit the fields before approving/rejecting
3. Financial Analyst - will verify all the information on the request, update any information needed, and select a preferred payment method (based on University Policy).
4. Department/Unit Level administrator
5. PI or Additional Approver(s) – Will route in order of entry
6. Dean of Finance and Administration

Email Notifications to Creator

- Once all approvals are complete, the Creator will receive an e-mail explaining the next step in the ordering process
    - Payroll – Your request for Purchase Form has been approved by the Finance Dean. The request approval is complete. Please submit a request to coehrandpayroll@uky.edu to complete the payroll transaction. This request cannot be processed through purchasing or accounts payable. Please review the form for additional notes and updates which may be added.
    - PRD – Your request for Purchase Form has been approved by the Finance Dean. The request approval is complete. The College of Education Financial Analysts will complete the PRD. Please review the form for additional notes and updates which may be added.
    - Procard Fiscal Team - Your request for Purchase Form has been approved by the Finance Dean. The request approval is complete. The College of Education Financial Analysts will complete the Procard purchase. Please review the form for additional notes and updates which may be added.
    - Procard Department - Your request for Purchase Form has been approved by the Finance Dean. The request approval is complete. The department can now complete the Procard Purchase, please reach out to your Business Officer for guidance. Review the form for additional notes and updates which may be added.
    - SRM/Shopping Cart - Your request for Purchase Form has been approved by the Finance Dean. The request approval is complete. The College of Education Financial Analysts will complete the SRM/Shopping Cart. Please review the form for additional notes and updates which may be added.
    - Other – please see notes - Your PPRF has now been approved, please see the notes on the Request to see how this should be purchased.

Additional Tips

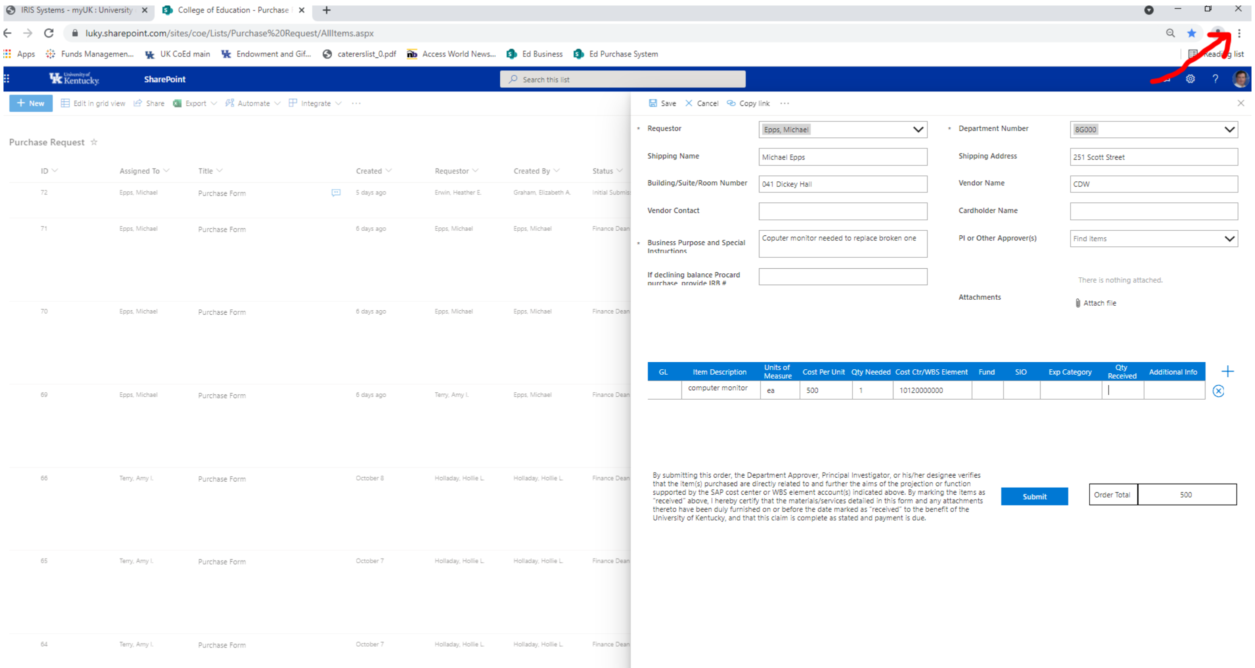
Review Order Status

Go to request list to see who is working on the request. Creator can also view any additional notes left by the Financial Analyst, including PRD or PO number, order date, goods confirmation date, etc.

Printing Form for Records or Additional Review

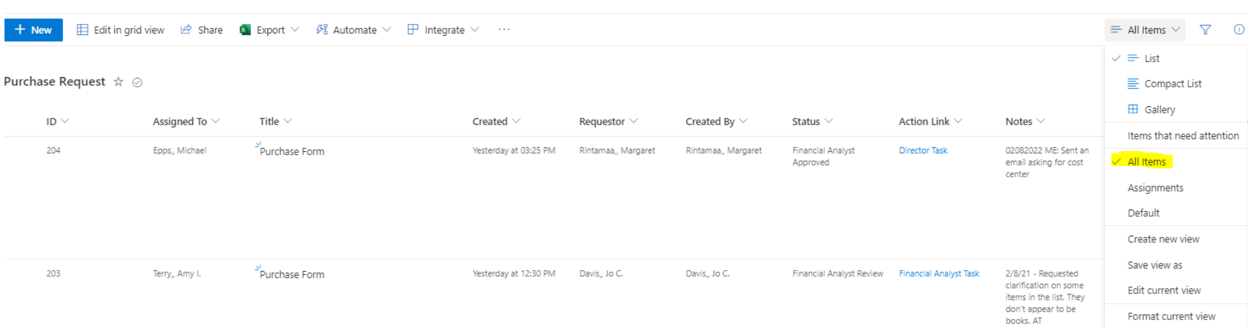
The form can also be printed and shared via pdf for record keeping or additional review/email. The form can be printed before or after submission. Use the Print Screen functionality. Select the 3 dots to the right of your browser bar.

From there, print the form as an Adobe file. DO NOT hit save as this will submit the form as a request. Once you print it, if you do not want to submit it yet, select the “Cancel” option.



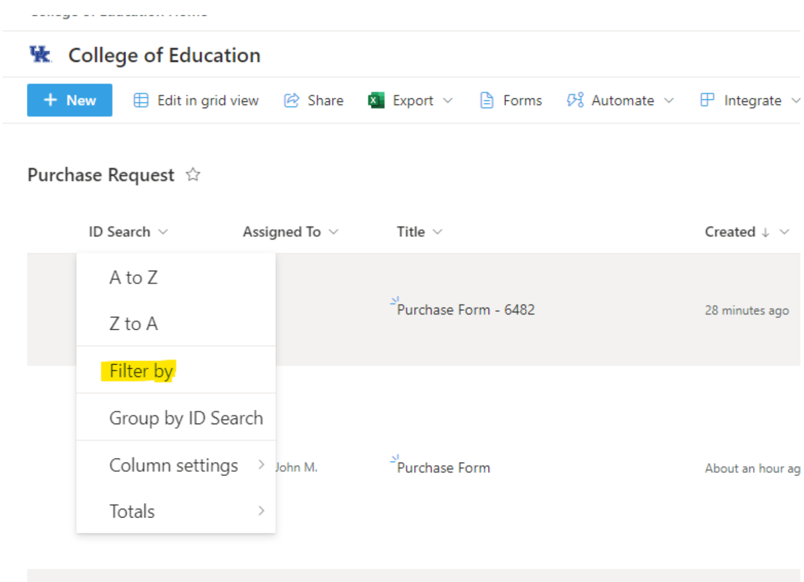
View – Default vs All Items

Sometimes the system reverts to a “Default” view which limits the items visible on your screen. To adjust this to see all the items available to you for tracking, select “All Items” instead.



Searching for a request by ID Number

1. Use the “ID Search” column. Click on the top of the column and select “Filter by”. This will open a drop down menu where you can type in the PPRF # you are looking for. Click Apply.

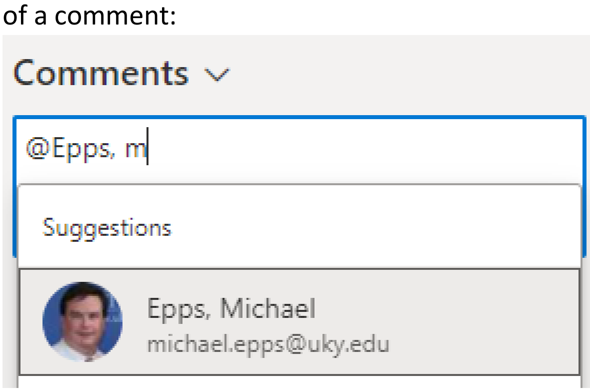


2. Enter the PPRF # in the Search List at the top of the screen. This may bring back multiple results, so please be careful selecting the right one.
3. The system ignores the ID in the normal search functionality. To search for a particular ID number, use ListItemID:###. For example ListItemID:300 will return ID 300.

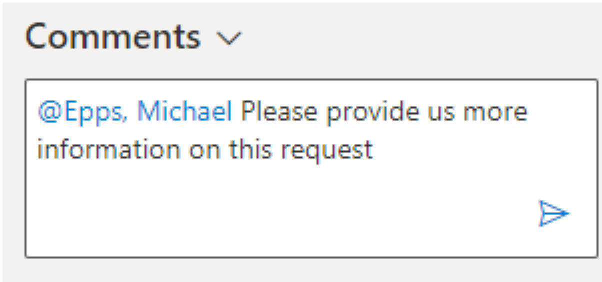
Comment Tool

This tool is only an option **before** your approval is done! This can be used to ask someone questions about a request before you approve or reject the item:

- Find the item
- Click on "Purchase Form" to open the form
- In the upper right hand corner of the form, click on the text bubble with 2 dots in it: 
- Type @ and then search for the individual you would like to get a response from or make aware of a comment:



- Write out the comment and hit send. The recipient will receive a link which takes them back to the form so they can respond to your comment.

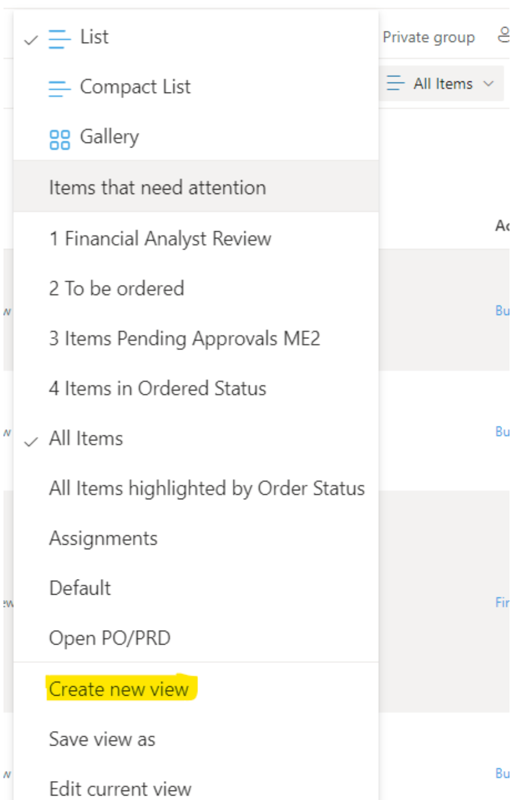


Customizing Layout

The layout of the list can be customized to have the columns you use most often in a location which better fits your needs. You can also save with filters on the columns.

PLEASE DO NOT MAKE CHANGES TO THE "ALL ITEMS" VIEW

1. Choose "Create New View" from the view menu:



2. Add a view name and de-select the Make this a Public View box
3. Click Create
4. Reorganize the columns and add the filters as you would like
5. Go back to the drop-down view menu and select "Save view as"
    a. Leave the name the same and click "Save"