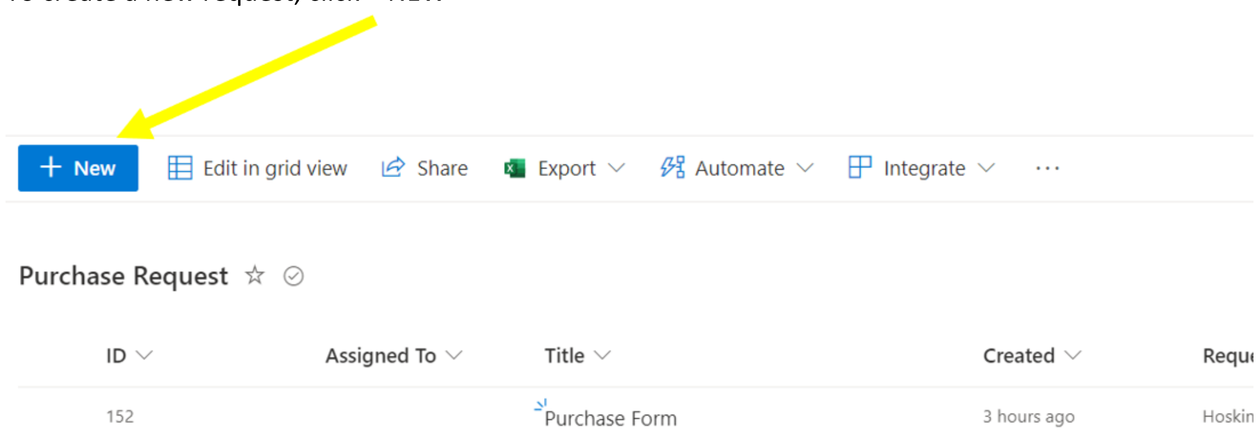
University of Kentucky
College of Education

College of Education Payment and Purchase Request Form Instructions For Creator

Quick Reference Guide

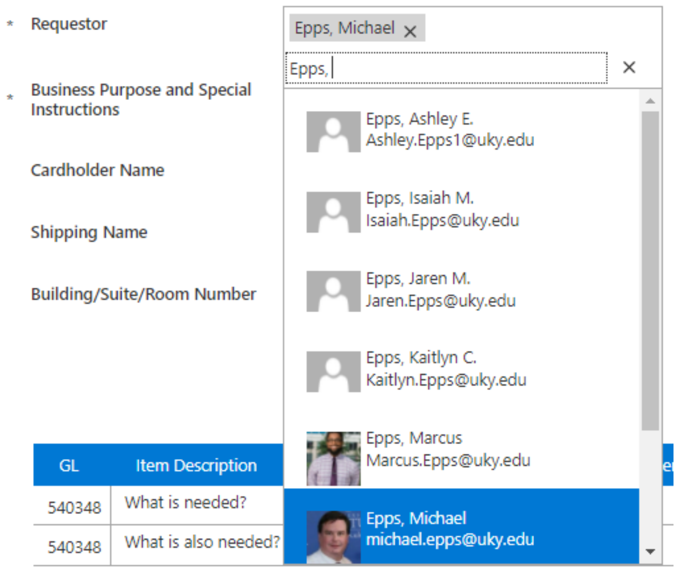
Payment and Purchasing Request Forms (PPRF) should be submitted and approved prior to completing any purchases, including travel. Generally, the PPRF for travel or memberships should be submitted a month prior to the travel date to ensure its approval before incurring any expenditures. A PPRF is not required for monthly observation mileage. Requests for individual or institutional memberships must be submitted on a separate PPRF request from other related expenses. Please note that employees may be responsible for costs incurred prior to PPRF approval if the request is not approved. The approved PPRF number must be included in the Concur report for Procard purchases in the “Additional Info” box, and the full business purpose should be included for each expenditure. Generally, the business purpose listed in Concur should be the same information listed on the PPRF since the information from the PPRF system is not connected to Concur.

1. To create a new or view existing Payment and Purchase Requests, go to the Business Center – College Requests Page
2. Click on the Payment and Purchase Request Form Link.
3. To create a new request, click + NEW



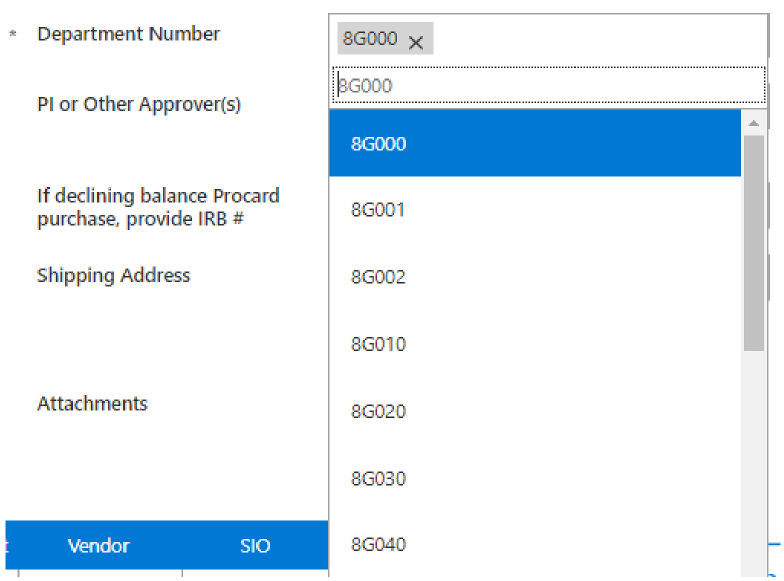
4. Enter data in fields and click Save. Required fields are marked with an asterisk.
   a. **Requestor** – (Required) Person you are completing request on behalf of. Start typing the requestor’s last name in the field until you see the desired individual. Click on the requestor’s information and the individual will be added to the field.

      NOTE: The Creator (person entering the order into the system) will have visibility to see the order in the system and review the order status. The Creator will also receive regular e-mail updates as the order progresses through the process. The Requestor (person the order is for) will not have visibility to see the order in the system and review the order status or receive regular updates. The Requestor and the Creator can be the same person or two different people. *Additional Note: The Creator can "Share" the order with The Requestor using the steps outlined later in the Additional Tips document.*



b. **Department Number** – (Required) When you click on the field, a drop down will appear with a list of departments. Choose your department from the list. If placing the order on behalf of another department within the College of Education, please select that department instead of your own. If placing the order on behalf of a department outside of the College of Education, please select your own department number.

NOTE: The department selected will drive the workflow process. Each department may have a representative who reviews the requests before it goes to the Financial Analysts. Each department's chair or unit's director will be an approver for those department numbers.



c. **Business Purpose and Special Instructions** *(Required)* - This must be a **detailed** statement listing the <u>W</u>ho will benefit from this (name of the employee, person, or group), <u>W</u>hat are the specific item(s) or service(s) being purchased and what the purpose will be, When it will be used, Where it will be used and Why it benefits the University to make this purchase.

   i. Below are some specific travel related business purposes.
      1. Presenting scholarly research paper at conference
      2. Serving on a conference research panel
      3. Presenting research poster
      4. Professional development
   ii. Example travel business purpose:
      - Who: Blue Wildcat, PhD – Professor
      - What: BEST (Best Educational and Scholarly Teaching) Conference
      - When: November 10 – 13, 2025
      - Where: Las Vegas, NV
      - Why: The primary purpose of this travel is to present/disseminate original research findings through oral presentation. This provides visibility for the University and supports the mission of advancing research.

d. **PI or Other Approver(s) –** Use this field if the expense must be approved by more than one supervisor. If the order is on a grant, the PI must be added as an approver. Do not add someone as an additional approver if they are already in the approval chain, or they will have to approve twice. *See the note above regarding the department number driving the first approver.* Begin typing the additional approver's name in the drop-down box and select the correct person as shown below.

e. **Cardholder Name -** Enter the cardholder's name if paying via Procard. If the department is using their Procard, enter the name of the Procard holder. If the department does not have a Procard or the order will be placed by the Financial Analyst, type "FA Procard".
f. **If declining balance Procard purchase, provide IRB#.**
g. **Shipping Name** - Provide a shipping name if different from the requestor or creator. This is the person who will be receiving the order, scanning the shipping label, and the packing slip. They will be forwarding these scans to the Financial Analyst and attaching copies in Concur and other appropriate places.
h. **Shipping Address -** Enter shipping address for the request. (If this is a reimbursement to a student, make sure to include the student's current mailing address here)
   NOTE: All computers, technology, and electronics must be shipped to the IT Group at 251 Scott Street in Dickey Hall 103, so the items can be entered into inventory and set-up if needed.
i. **Building/Suite/Room Number -** Enter the building, suite, or room number for the delivery.
   Note: Items without a defined building/suite/room number will be sent to Dickey Hall 103, and it will be up to the Department to pick up the package(s) from there. It is the

Department's responsibility to ensure there will be someone available at the address selected for delivery of the items.

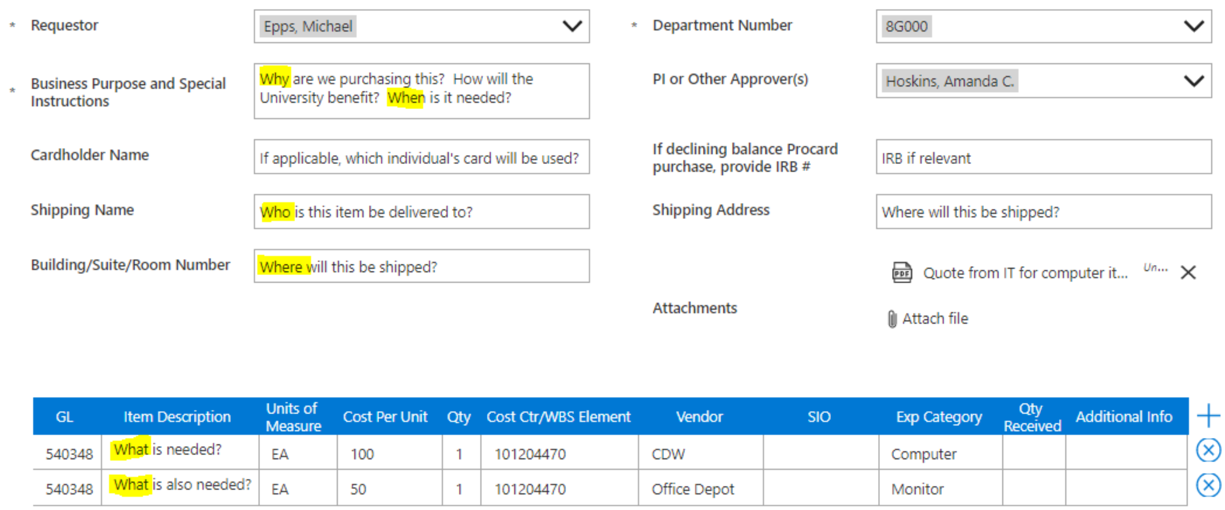
j. **Attachments –** Attach any quotes, shopping carts, or University required documents (ex: PBS form, Scope of Work…) to the request by clicking "Attach File". This will open another window for you to upload the needed document(s). If presenting research at a conference, the presentation acceptance notification must be attached to the PPRF request.

k. **Enter Items –** Items can be entered by clicking the + sign on the right, complete with as many rows as necessary. For long lists (e.g. for participant support for individuals), an excel file can be uploaded instead of multiple requests.

    i. GL - If you know the General Ledger (GL) enter it here.
    ii. Item Description - Provide a brief description of the item.
    iii. Units of Measure: Provide the units of measure (each, lot, case, etc.)
    iv. Cost per Unit: Enter the cost for each individual unit.
    v. Qty Needed: Provide the quantity of the item that you are requesting.
    vi. Cost Center/WBS Element: Enter the cost center or WBS to be charged for the item.
        1. *If no Cost Center or WBS Element is identified for the item(s), the FA Analyst will Reject the order, and it will need to be re-entered*
    vii. Vendor: If there is a preferred vendor or a vendor contact, please include this information here. Sometimes there are different vendors for each line.
    viii. SIO: If appropriate, enter the Statistical Internal Order Number.
    ix. Exp Category: Provide an expense category. (Computer, Office Supplies, Teaching Supplies, Registration, etc.)
    x. Qty Received: This will be completed by the FA once the request has been fulfilled.
    xi. Additional Info: Enter any additional information you feel is necessary for the item.
    xii. To add another item, click the + sign.

GL	Item Description	Units of Measure	Cost Per Unit	Qty	Cost Ctr/WBS Element	Vendor	SIO	Exp Category	Qty Received	Additional Info
540348	What is needed?	EA	100	1	101204470	CDW		Computer		
540348	What is also needed?	EA	50	1	101204470	Office Depot		Monitor		

l. The 5 W's - (Who, What, When, Where, and Why) can be used to determine if the documentation and business purpose meet the University standards. See the example below:



* Requestor	Epps, Michael	* Department Number	8G000
* Business Purpose and Special Instructions	Why are we purchasing this? How will the University benefit? When is it needed?	PI or Other Approver(s)	Hoskins, Amanda C.
Cardholder Name	If applicable, which individual's card will be used?	If declining balance Procard purchase, provide IRB #	IRB if relevant
Shipping Name	Who is this item be delivered to?	Shipping Address	Where will this be shipped?
Building/Suite/Room Number	Where will this be shipped?	Attachments	Quote from IT for computer it... Un... ; Attach file

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5. Once all items have been entered, review form for completeness, click SUBMIT or Save. This will send your request to the department Business Officer or the Financial Analysts for review.
6. College Financial Analyst will determine purchasing method, if:
   a. PRD/SRM
      i. The COE Financial Analyst will create the PRD or Shopping Cart. The approved PPRF number will be listed in the Assignment field on the PRD/Shopping Cart.
      ii. The order will be placed, and the requestor will receive a confirmation email that the order is complete.
      ~~iii.~~ As the items are received, please send a scanned copy of the packing slips to COE Financial Analysts coecfa@uky.edu
   b. Department/Unit Procard
      i. Once the final approval from the Assistant Dean for Finance and Administration is completed, Department/Unit will complete Procard purchase.
      ii. You may now contact the vendor, place the order, and pay for the purchase with the approved Procard.
      iii. An itemized receipt and applicable packing slips are required documentation for Procard reconciling.
      iv. The approved PPRF number should be listed on the Concur report for the corresponding expense(s) in the "Additional Info" field.

Additional Steps for pre-approval PRD purchases

1. Once the product(s) arrive, copies of all packing slips should be scanned as a pdf and emailed to the Financial Analyst at coecfa@uky.edu so the documents can be added to the system for audit trail, and the PRD can be submitted for payment. (The PRD will be marked as Open in the system by the Financial Analyst until all the necessary paperwork is gathered)

Additional Steps for Shopping Cart purchases

1 Once the product(s) arrive, copies of all packing slips should be scanned as a pdf and emailed to the Financial Analyst at coecfa@uky.edu so the documents can be added to the system for audit trail and a goods confirmation.

2 Note about Open POs – Sometimes a PO is left open (such as a Reverse PO or a partially received PO). In these cases, the Analyst will mark it, and it will show as an open PO until all the paperwork has been received and confirmations are completed.