

PR Form

The Purchase Request (PR) form can be accessed [here](#).

Purchase Requests are classified as:

1. General Expense(s)
2. Part-Time Instructor (PTI)
3. Personnel (has subcategories)
 - a. Faculty
 - b. Staff
 - c. STEPS
 - d. Students
4. Travel

Please select the form that best describes the purpose of your purchase request.

Purchase Requests will need a separate form for each account from which funds are being requested. In other words, if you need to split a charge between two accounts, one PR should be submitted for each account.

There are two new fields that REQUESTORS will be required to fill out, one of the new fields only pertains to purchase requests on grants.

The first field that is required for ALL purchases is selecting a "Category." The PR now requires that a requestor selects the category that best describes the type of item/service being requested. Each requested item will need to have a category selected. Use your best judgement. The business office will review for correctness during the level one review. Please refer to "Appendix A" for descriptions related to categories.

In addition to the category field, the requestor will be required to select the budget line for any PRs submitted using grant funding. If you are unsure what your budget lines are, reach out to your account manager prior to submitting your PR.

Definition of Purchase Request Form:

General Expense: This includes purchasing items and services.

Examples include events, faculty/staff recruitment, incentives, independent contractors, office supplies, transcription cost, laptops, etc.

Travel: Mileage and overnight travel report. This includes travel reimbursement submitted through Concur. Additional information will be requested upon approval of PR.

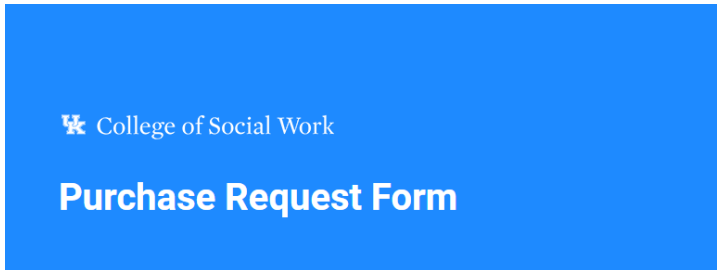
Personnel-Faculty: To request funding for faculty positions.

Personnel- Staff: To request funding for any REGULAR full-time and part-time staff positions. Additional information will be requested upon approval of PR to provide CoSW internal Human Resources team with all necessary information.

Personnel- STEPS: To request funding for TEMPORARY positions. Additional information will be requested upon approval of PR to provide CoSW internal Human Resources team with all necessary information.

Personnel-Student: This includes any hourly student, Graduate Assistantships, Teaching Assistantships, and Research Assistantships. Additional information will be requested upon approval of PR to provide CoSW internal Human Resources team with all necessary information.

All forms can be accessed from the main form link:



What type of purchase request are you submitting?

Select

- General Expense(s)
- Part-Time Instructor (PTI)
- Personnel
- Travel

General Expense(s) Requests

You will follow the same procedure used in the previously fiscal year.

Please note this form should not be used for mileage, overnight travel, or position requests.

Below is an example of a grant general expense request. This will be the same procedure for a cost center **EXCEPT** when it asks, "Will this request be charge to a grant?" You will select "NO."

STEP 1: Enter in all contact details requested. After the grant is selected, you will not be prompted to select the line item within the grant that the requested expenses will need to charge.

If you are not sure, then you need to reach out to the PI or Assistant Director of the project to ensure that the correct line is selected.

What type of purchase request are you submitting?

General Expense(s)

Requestor Name (First & Last) *

Mark Pope

UKY Email *

Mark.Pope1234@uky.edu

Phone *

+1 (000) 000-0000

Will this request be charged to a grant? *

Yes

Please select the grant to be charged: *

320005498 - Adoption Support for Kentucky-ASK

Adoption Support for Kentucky (ASK) *

Please select the grant line item this PR will charge against:

E530402 - Postage*

This is a new requested item in the PR. Please review your budget, and discuss with the PI, Assistant Director, or individual most familiar with your budget to provide you with the option that needs to be selected. If you are unsure who this is, reach out to the business office at coswbusiness@uky.edu



Step 2: After the selection of being the PI or not, and if you need a procurement card in hand to make the purchase, the next NEW step is selecting an item “category.” Please use your best judgement and ensure that it aligns with the grant line items selected above.

The screenshot shows a procurement request form with the following fields:

- Are you the Principal Investigator (PI) of this grant? *
No
- Will you need a Procurement Card in hand for any part of this request? *
No
- Vendor *
USPS
- Please select the category that most closely represents the item you are requesting: *
S30402 - Postage
- Item Description *
Stamps
- Item Quantity *
100
- Item Price (per unit) *
.69
- Item Link
- Are you requesting any additional item(s)? *
No
- Has your supervisor approved this request? *
Yes

A red box highlights the "Please select the category..." field, and a red arrow points to it from the following text:

Use your best judgement to select the category that meets the description of the item being purchased.

NOTE: If you are having a hard time deciding, please refer to the Category Descriptions helper on the Faculty and Staff Resources.

Step 3: The remaining questions should all look familiar to you. This section is requesting the same information from last fiscal year. The 5 “Ws” are very important during an audit. Please ensure to answer them as defined underneath each “W.”

DO NOT copy and paste the same sentence of information for each section. If this happens, the PR will be returned for edits until the justification meets the requirements of the section.

The file upload section should include any pertinent receipts, invoices, and other documents needed to process your payment. If you are unsure what those documents could be, please reach out to your business office at coswbusiness@uky.edu.

The 5 "Ws" (Who, What, Where, When, and Why) can help you determine if the expense meets the criteria of a University business purpose.

Who *

Documentation must note specifically who the expense is for.

Mark Pope, UK Basketball Coach

What *

The University needs to know what type of event or activity will occur, or what will be purchased. All receipts or invoices should be itemized.

Purchasing Stamps

Where *

Document where the business activity will take place.

USPS

When *

Document when an event will occur.

As soon as PR is approved.

Why *

Most importantly, substantiate why the expenses are reasonable and appropriate for the university. The "Why" should include the primary reason for the expense.

This postage is to help recruit folks into the program by mailing tickets to an upcoming basketball game, and packet that includes details about the program, how to enroll, and appreciation for their interest by signing up for more details.

Comments

File Upload

Drag and drop files here or [browse files](#)

Submit

Please ensure that you provide thorough justifications in the 5 "Ws" section. Copying and pasting the same sentence in each field will not be accepted and will result in the PR being sent back for edits.

ACCESSING SUBMITTED PRs – DYNAMIC VIEW

You can access submitted purchase requests using Dynamic View: <https://dynamicview.smartsheet.com/>

Note: to log into Dynamic View, you must have a Smartsheet account. If you need an account, please complete the CoSW Smartsheet Access Request form here:

<https://app.smartsheet.com/b/form/add5c144e1bf4a1db92632c7e7d839c8>

Submitted PRs – Dynamic View for REQUESTORS

Once a PR is submitted via the purchase request portal, it is considered a “*pending*” request. To view your **pending PRs**:

- Log into: <https://dynamicview.smartsheet.com/>
- select **PRs - REQUESTER View**

From this view, you can make edits/updates to your pending PR (if needed) and attach relevant documents.

- If your PR has NOT been reviewed and approved by the Level 1 Reviewer (CoSW Business Office) all form fields are available for editing in the **PRs – REQUESTOR View**.
- If your PR HAS been reviewed and approved by the Level 1 Reviewer (CoSW Business Office), but has not been fully approved [i.e., has not received Level 2 approval or Level 3 approval (if applicable)], you can make edits by selecting **Yes** in the **MODIFY PR** field from within the **PRs – REQUESTOR View**.
 - **NOTE:** After selecting “Yes” in the MODIFY PR field, certain form fields will become editable again (this may take several minutes, as multiple workflows must run). Whenever you select MODIFY PR, all previous approvals are voided, and the PR will be sent back to Level 1 for re-review.

Once a PR has received all necessary approvals, it is considered an “*approved*” request. To view your **approved PRs**:

- Log into: <https://dynamicview.smartsheet.com/>
- select **PRs – INVOICES/RECEIPTS**

From this view, you can upload invoices, documents, receipts, etc. You will not be able to modify the PR in this view, as all approvals have already been completed. If you need to change or edit the PR at this point, please email the Business Office (CoSWBusiness@uky.edu).

Submitted PRs – Dynamic Views for LEVEL 2 and LEVEL 3 REVIEWERS

Once a PR is submitted via the purchase request portal, it is considered a “*pending*” request. The CoSW Business Office serves as the Level 1 reviewer for all purchase requests.

Once a PR has received Level 1 approval, the request flows to the Level 2 reviewer. If you are a Level 2 reviewer, you can view all PRs needing your review here:

- Log into: <https://dynamicview.smartsheet.com/>
- select **PRs – L2 REVIEWER View**

Similarly, if you are a Level 3 reviewer, you can view all PRs needing your review here:

- Log into: <https://dynamicview.smartsheet.com/>
- select **PRs – L3 REVIEWER View**