

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.

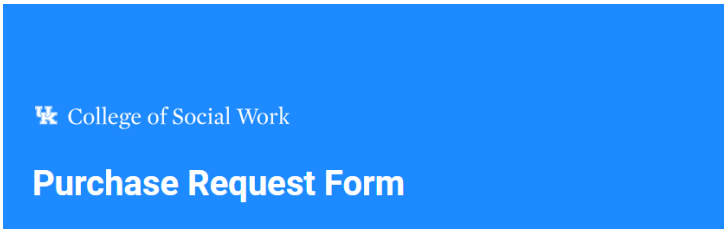
Personnel- STEPS: To request funding for TEMPORARY positions. Additional information will be requested upon approval of PR to provide CoSW internal Human Resources team with all necessary information.

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:

Travel Requests

If you select a travel request, you will see the screenshot below. Please click on the hyperlink to be redirected to the travel request form.



What type of purchase request are you submitting?
Travel

For TRAVEL requests, please complete this [form](#)

Submit

Click on this hyperlink



Ensure that you are **selecting the hyperlink**. **DO NOT** select the “Submit” button. This just sends a blank PR to the business office.

All fields marked with a red asterisk (*) on the travel form are required. As questions are completed, additional questions may pop up (i.e., this is a dynamic form).

Please note: the travel form expenses are calculated differently from previous purchase request forms.

Step 1: You will be asked the bare minimum when completing this initiation step. Please prepare a list with estimated prices for all the items you will need to purchase to attend the trip (airfare, lodging, baggage, per diem, etc.)

TRAVEL Requests

Requestor Name (First & Last) *

Requestor Email *

Phone *

Is this request for a conference or event? *

Enter the name of the conference or event: *

Will this request be charged to a grant? *

Please select the account to be charged: *

Will you be using professional development funding (13) for this request? *

Please create a Trip Name, using the format below: *

Last Name, Destination, Month, Year

e.g., SmithSanDiegoJune2025

Travel Type: *

NOTE: you can copy and paste one of the options below:

- Employee
- Student
- Official Guest
- Candidate/Future Employee
- Future Student
- Patient
- Research Advisory board
- Research Participant Support
- Research Subject
- Visiting Speaker
- Collaborator
- Other (please specify in text box)

Travel Destination *

City, State, Country

Trip START and END Dates *

Please include a date range in the following format: **mm/dd/yy - mm/dd/yy**

Primary purpose for this travel? *

NOTE: you can copy and paste one of the options below:

- Advancement/Fundraising
- Conference/Workshop-Participant
- Conference/Workshop-Speaker
- Group/Team Travel
- Meeting Collaboration
- Other Travel (please specify in text box)
- Recruiting
- Research/Teaching

Step 2: To ensure you are prepared to enter the total cost for the trip, you will be prompted to enter a summed amount of all travel expenses.

Expenses

Please sum all of the costs listed below (as applicable): *

- Airfare
- Checked Baggage
- Lodging
- Per Diem
- Mileage (\$0.43/mile for DCBS, otherwise \$0.67/mile)
- Car Rental (WITHOUT insurance)

Enter SUMMED TOTAL here:

Are there any registration fees associated with this request? *

Will you be paying for parking? *

Will you be using ground transportation? (Taxi, Uber, Lyft) *

Do you anticipate any additional expenses not previously mentioned? *

If applicable to your travel request, please sum all airfare, checked baggage, lodging, per diem, mileage, and car rental fees.

Example:

- Airfare = \$789
- Checked baggage = \$60 (round trip)
- Lodging = \$1000 (\$250/night * 4 nights)
- Per Diem = \$200 (\$50/day * 4 days)
- Mileage = \$0
- Car Rental = \$450

SUM = \$2499

Registration fees, parking fees, ground transportation (e.g., Uber, Lyft, taxi, etc.) and other expenses are calculated separately. Complete each field, as applicable.

After submitting a travel purchase request, you will receive an email stating that additional information is needed to process a PR. Click on **Open request**.

Your travel PR: has been approved, but we need additional information for booking with CONCUR. Please click on "Open Request" below and answer all questions/fields applicable to your trip.

Please also attach a conference or event agenda at the bottom of the form.
Note: PDF format ONLY.

Open request

Complete all applicable fields, attach a conference, or event agenda (if available), and click on **Submit Update**.

Please note that this additional information follows the information that you will need to enter your Concur Travel Report. Additionally, it allows the business office to provide better assistance if you run into any issues when submitting your Concur Travel Report.

Your travel PR: TEST has been approved, but we need additional information for booking with CONCUR. Please click on "Open Request" below and answer all questions/fields applicable to your trip.

Please also attach a conference or event agenda at the bottom of the form.
Note: PDF format ONLY.

Does this trip include Personal Travel?

Please Indicate Personal Travel Dates

Are you requesting daily per diem?

Where are you departing from? (City, State, etc.)

On what date will you arrive at your destination?

Submit Update

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**