

# **Purchase Requisition and Travel Requisition Procedures**

To ensure uniformity in the submission and approvals of purchase requisitions and travel requisitions, the attached procedures are to be used.

## **Personnel**

LaSonia Brown

Initiates travel requisitions for Extension non-faculty personnel (agents, staff, program leaders and Associate Dean).

Trang Doan

Oversees budget and technical issues for PI-funded external grants. Located in the college Dean's office suite.

Donna Hinton

Administrative Assistant for Extension faculty. In addition to other duties, is responsible for entering Purchase Requisitions into Sciquest and for facilitating Travel Requisitions for Extension faculty. Located in the Department of Agricultural and Environmental Sciences office, 108 Lawson Hall.

Rolynne Anderson

Administrative Assistant for Research faculty. In addition to other duties, is responsible for entering Purchase Requisitions into Sciquest and for facilitating Travel Requisitions for Research faculty and oversees budgetary issues for Research capacity. Located in the college Dean's office suite.

Holly Hodges

Administrative Assistant for Nursery Research Center personnel. In addition to other duties, is responsible for entering Purchase Requisitions into Sciquest and for facilitating Travel Requisitions for NRC faculty. Located at the Nursery Research Center.

Cassandra Williams

In addition to other duties, oversees budgetary issues for Extension capacity funds. Located in the college Dean's office suite.

## **Procedures**

### **Purchase Requisitions**

Purchases should be planned in advance to permit adequate time for administrative processing. Emergency requisitions must be discussed with, and approved by, the Dean.

#### Purchase Requisitions using PI-funded External Grants

The only person who may authorize the expenditure of funds from an external grant is the PI for that grant. The PI is responsible for the fiscal integrity of their grants and must review and approve all expenditures.

The PI initiates, or works with the appropriate administrative assistant to initiate, an online Purchase Requisition in SciQuest. All necessary quotes, W-9 forms, and other required documentation are to be attached to the requisition at time of submission.

Research faculty utilize the administrative assistant assigned for research items (Rolynne Anderson); Extension faculty utilize the administrative assistant assigned to the office of the Associate Dean for Extension (Donna Hinton); Nursery Research Center faculty utilize the administrative assistant assigned to the Nursery Research Center (Holly Hodges).

Administrative assistants are to review all requisitions in their area of responsibility to ensure the requisition is in compliance with university and college procurement policies.

For shipments that have not been received through Central Receiving, a receiving report (quantity report) must be generated in SciQuest. If the items received are not exactly the identical items in the original Purchase Order, a Change Request must be made for that Purchase Order in SciQuest. PIs are to ensure receiving reports are generated, either by completing them personally or through the appropriate administrative assistant.

After the requisition is entered into SciQuest, the approvers are: the PI, the administrative assistant, the Unit Head, the appropriate Associate Dean, and the College Business Office (Trang Doan).

All requisitions for food or that are over \$10,000 require approval from the Dean.

#### Purchase Requisitions using College-Funded Capacity Funds

For purchases made with Capacity Funds allocated as part of a faculty member's capacity-funded college project (*i.e.* the standard \$5,000/\$2,000 funds supplied by the college), the faculty member works with the appropriate administrative assistant to initiate an online Purchase Requisition in SciQuest. All necessary quotes, W-9 forms, and other required documentation are to be attached to the requisition at time of submission. Approvers for these funds are the faculty member, the unit head, and the appropriate Associate Dean. Requisitions for food require approval from the Dean. Research faculty utilize the administrative assistant assigned for research; Extension faculty utilize the administrative assistant assigned to the office of the Associate Dean for Extension; Nursery Research Center faculty utilize the administrative assistant assigned to the Nursery Research Center (Holly Hodges).

Purchase Requisitions must be entered into SciQuest by an administrative assistant. The administrative assistant will enter the faculty member's name in the "Prepared For:" space on the SciQuest requisition form.

For purchases requested from Capacity Funds that are not part of a faculty member's capacity-funded college project (*i.e.* NOT the standard \$5,000/\$2,000 college funding), the PI works with the appropriate administrative assistant to initiate a requisition prepared manually on a Capacity Fund Requisition Form. This form is available on the college web site, Faculty and Staff Portal.

All necessary quotes, W-9 forms, and other required documentation are to be attached to the requisition at time of submission. All documentation is forwarded to the college business office (Cassandra Williams for requests from Extension faculty, Rolynne Anderson for requests from Research faculty). Upon entering the requisition into SciQuest, the faculty member's name will be entered in the

"Prepared For:" space on the SciQuest requisition form.

Approvers for these requisitions (college-funded capacity funds) are the appropriate Associate Dean and the Dean.

## **Travel Requisitions**

Travel should be planned in advance to permit adequate time for administrative processing. Emergency travel requisitions must be discussed with, and approved by, the Dean.

Failure to follow the processes below will result in non-reimbursement of expenses.

### Travel Requisition using PI-funded External Grants

Travel requisitions must be approved by the Travel Office prior to employee travel. The university is not obligated to reimburse employees for expenses incurred during non-approved or unauthorized travel.

Two forms are required to complete the travel requisition process, one is a paper form to be signed and submitted manually, the other is completely online.

All travel is initiated through the appropriate administrative assistant: Research faculty: Rolyne Anderson; Extension faculty: Donna Hinton; Extension staff: LaSonia Brown; NRC faculty/staff: Holly Hodges.

The paper Travel Requisition Form and all required documentation (lodging confirmation, meeting information, Overseas Authorization Form [if needed], etc.) are forwarded via the appropriate administrative assistant for approval by the PI and unit head. The administrative assistant will then forward the paper form and documentation to the Travel Office. All signatures should be dated.

In addition to the paper form, an online Travel Requisition is also submitted through SciQuest. Only the appropriate administrative assistant is authorized to enter travel requisitions into SciQuest for travel utilizing external funding. In the submission, the PI, Unit Head, appropriate Associate Dean, [International Director, if needed] and appropriate Grants and Accounting representative are to be listed as approvers of the requisition. For international travel, the college Director of International Programs is also added as an approver. A scanned copy of the paper form (with all approvals) should be included with the SciQuest submission as an attachment. The Travel Office will not approve travel requisitions that do not follow this submission and approval procedure.

### Travel Requisition using College-Funded Capacity Funds

Travel requisitions must be approved by the Travel Office prior to employee travel. The university is not obligated to reimburse employees for expenses incurred during non-approved or unauthorized travel.

Two forms are required to complete the travel requisition process, one is a paper form to be signed and submitted manually, the other is completely online.

All travel is initiated through the appropriate administrative assistant: Research faculty: Rolyne Anderson; Extension faculty: Donna Hinton; Extension staff: LaSonia Brown; NRC faculty: Holly Hodges.

The paper Travel Requisition Form and all required documentation (lodging confirmation, meeting information, Overseas Authorization Form [if needed], etc.) are sent via the appropriate administrative assistant to the Dean for approval, who then forwards the paper form and documentation to the College Business Office for review and forwarding to the Travel Office. All signatures are to be dated.

In addition to the paper form, an online Travel Requisition is also submitted through SciQuest. Only the College Business Office is authorized to enter travel requisitions into SciQuest for travel utilizing capacity funding. In the submission, the Unit Head, appropriate Associate Dean, and Dean are to be listed as approvers of the requisition. For international travel, the college Director of International Programs is also added as an approver. A scanned copy of the paper form (with all approvals) is to be included with the SciQuest submission. The Travel Office will not approve travel requisitions that do not follow this submission and approval procedure.