

How to Submit a Purchase Request

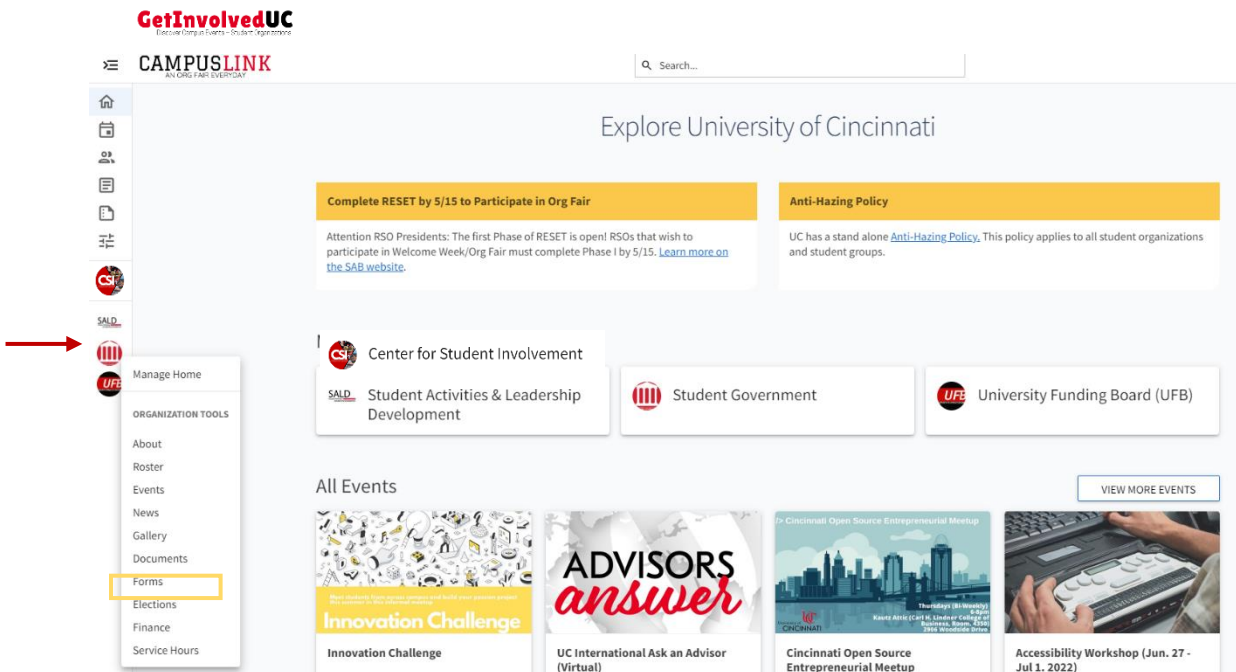
- The Purchase Request form can be used to purchase items with university funds from a yearly allocated budget, operating funds, or for a line item within an approved budget.
- Requests should be made at least 10 days prior to an event. Additional time is encouraged for travel and other larger expenses.
- One purchase request should be submitted for each vendor you are purchasing items from.
- Please review the [Preferred Vendors for Student Organization Purchasing](#) prior to completing your request.

Step One:

Sign on to getinvolved.uc.edu with your UC credentials. Only organization members that have completed finance training should submit Purchase Requests in GetInvolvedUC.

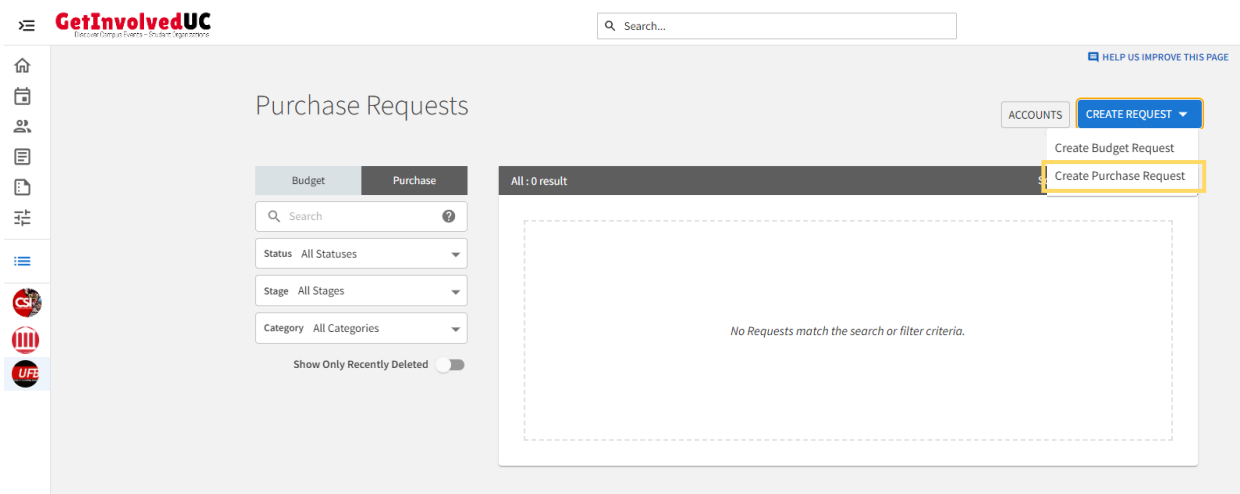
Step Two:

On the left-side task bar, click your organization's circle icon to open your organization tools menu. Select "Finance"



Step Three:

Select the "Create New Request" drop down menu and click on "Create Purchase Request"



Step Four:

Select the Purchase Request Category:

- Approved Budget
 - If you are accessing funds from an approved UFB budget, select this option
- Operating Funds
 - If you are utilizing UFB Operating Funds
- Reimbursement
 - If you plan to make a purchase with a personal credit card on behalf of an organization with approved funding or available funding. This option should be prioritized over the type of funding you're using. Any request for reimbursement should be categorized as Reimbursement or it may be processed incorrectly. **No purchases should be made with Reimbursement if the organization does not have funding available.**
 - Reimbursements MUST BE submitted within 15 days of making the purchase. Any Reimbursement Requests submitted after 15 days of making the purchase will not be approved.
 - Additional information on requirements for Reimbursements can be found in the Purchase Request form.
- Yearly Allocation
 - If your organization receives a student fee allocation on a yearly basis deposited into your GetInvolvedUC organization account (e.g. AIC groups, Club Sports, Student Government/Tribunals)

If the request is for an approved UFB budget, select "Populate from Budget" and the correct budget line item for the purchase request.

Step Five:

Select the Account your request will draw from:

All eligible RSOs have two GetInvolvedUC accounts. "Operating Fund – Org Name" is used for all operating fund requests. "Budget – Org Name" is used any time you submit a budget request to be heard by UFB.

The screenshot shows a web form titled "Create Purchase Request". The "Request Details" section includes a "POPULATE FROM BUDGET" button, a "Subject" field, a "Description" text area, a "Requested Amount" field showing "\$ 0", and a "Categories" dropdown menu. The dropdown menu is open, showing options: "Administrative", "Approved Budget", "Operating Funds", "Reimbursement", and "Yearly Allocation". To the right of the "Categories" field is an "Account" field with a "SELECT..." button.

Step Six:

Complete all the fields within the form. You will need to download a copy of the Purchases Template document linked in the Purchase Request to enter the items you are requesting for purchase. Please ensure all columns are filled out before reuploading.

Purchases Template Instructions:
This template should reflect the items you plan to purchase as part of operating funds or an approved budget. Please download, edit and reupload a copy of this document into the corresponding Purchase Request in GetInvolvedUC. One template and purchase request should be submitted for each vendor you are purchasing items from.
(Example: if you are purchasing items from Amazon and Adriatico's Pizza, you will need to submit two purchase requests each with it's own list if items)

Organization Name			Purchase Request #:	
Item Name	Item/Model Number	Quantity	Price per Item	Link to Item

Step Seven:

Before you click "Submit," review the instructions at the bottom of the form. Purchase Requests must receive approval from your organization's treasurer and advisor prior to our financial administrators making a payment. To move the request to another review stage:

- Find the management menu by selecting your organization's circle icon on the left side of the GetInvolvedUC homepage. Select "Finance"
- Select the purchase request you want to review
- After reviewing the request, select "Change Stage" in the top right corner
- Select the dropdown menu, select the next review stage.
 - Treasurers should move to "Advisor Review"
 - Advisors should move to "Financial Admin Review"
- Save changes

Ensure your GetInvolvedUC email notifications are on. Before reaching out to Center for Student Involvement staff regarding the status of your request, please check the submission comments found on the right side of the request

The screenshot displays the 'Purchase Request #' form in GetInvolvedUC. The main form area shows fields for 'Submitted By', 'Organization', 'Request Title', and 'Request Description'. On the right side, a sidebar titled 'No Unsaved Changes' contains a 'Status' dropdown (set to 'Canceled'), a 'Stage' dropdown (set to 'Treasurer Review'), and a 'Category' dropdown (set to 'Administrative'). Below these are 'From Account' and 'Balance' fields. At the bottom of the sidebar, there is a 'Reviewer Comment' section with an 'EDIT' button and a note: 'Editable memo visible to anyone who can view this request. No reviewer comments'.

Additional Notes:

- Please provide an event date in your Purchase Request to ensure items are paid and purchased items requiring shipping can arrive on time
- For any food/beverage purchases (including reimbursements) you will need to submit an event flyer stating food or beverages will be provided or a list of attendees
- For travel reimbursements you will need to complete a [Travel Authorization and Roster Form](#)
- All Purchase Requests must be in Financial Admin Review before you should contact a Financial Administrator
- We are not able to reimburse sales tax (except for flights/hotels)
- Check comments on the right side or bottom of the Purchase Request to see if more information is needed or if Purchase Request has been processed
- If it has been more than 4 business days, reach out to the financial administrator via email referencing the 4-digit request number