PURCHASING: P-Card, Shop Catalogs (Buy Ways), and Requisitions (POs)

Complete a Purchase Request Form with all of the requested details (see “Purchasing” box on next page). Requests will be reviewed in the order they are received. If follow up is necessary, the purchase may be delayed. The requestor can expect an email from a team member once their order has been completed. Packing slips must be turned in to the PTR team.

TRAVEL: As soon as you know you will be traveling, please alert the team to your plans by completing the Travel Authorization Request Form with the requested details.

The requestor can expect an email from a team member once the Travel Authorization has been completed. (See “Travel” box on next page for more details.)

REIMBURSEMENTS: Print out and complete the Reimbursement Request Form and follow the steps provided.

Reimbursement requests can only be initiated with original receipts submitted by the purchaser/traveler. As such, this is a function of the PTR team that cannot be handled via email. (See “Reimbursements” box on next page for more details.)
PURCHASING
P-Card, Shop Catalogs (Buy Ways), and Requisitions (POs)
Purchasing is fairly straight forward. A Purchase Request Form should be submitted to the PTR team with the following details for prompt processing:

• PI Name/Account Owner
• Account number to charge
• Vendor name
• Link to vendor website (if applicable)
• Description and Catalog/CAS number
• Quantity
• Detailed research purpose
• Room/Building number for delivery
(Note: OC, CSML, Koffler, and CSB will still be directed to OC 104)
• Approximate Price
• Shipping Preference (if not indicated, will default to vendor’s standard)
• Does the order include a chemical? (Remember: PTR team members are not scientists. Gloves and filters are obvious but many requests/names are not.)

*Note: If each of the above areas is not addressed, it may delay the processing of the order.

Capital purchases (over $5,000) are regulated and must be addressed separately. Contact a member of the team.

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TRAVEL
Please alert the team as soon as you know you will be traveling
To initiate the travel authorization and purchase tickets for a business trip, please complete the Travel Authorization Request Form.

Some travel may require further information or in-person meetings to purchase tickets, registrations, etc. Please note that the PTR team will not “shop” for preferred itineraries, hotel rooms, etc. The expectation is that all “shopping” will be completed by the traveler prior to meeting with the PTR team member and prior to the PTR team member processing the request to purchase tickets.

Please note that increased layers of policy at the University level may require further inquiry and action in addition to the outline above, depending on the destination. Examples of follow up information needed may include:

✓ Necessary information to book flights (i.e.: Legal name, date of birth, phone number, emergency contact, etc.)
✓ Lodging as designated by vendor/seminar group or not applicable
✓ Traveler’s preference for hotel reservations on their personal credit card or request accommodations arranged by PTR

Any travel may also be subject to an array of new and developing University policy, including but not limited to Conflict of Interest updates, Export Control, Warning Country documentation, and general travel registration online that only the traveler can complete (the PTR team cannot perform these tasks).

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REIMBURSEMENTS Print and complete the Reimbursement Request Form and submit with original receipts.
Receipts should be placed in a sealed envelope and the envelope stapled to the form. The completed package can then be addressed to or dropped off at one of these locations: BSW 362B or the CBC Business Office mail box in OC 221. Once prepared, you will be contacted for signature. Signatures must be original for UA compliance purposes.