Purchasing, Travel and Reimbursements Team (PTR)
cbc-PTRteam@email.arizona.edu

Revised: 09/01/2015

- All questions and requests related to Pcard purchasing, Shop Catalogs (Buy Ways), purchase orders, reimbursements and travel should be sent to the “Purchasing, Travel and Reimbursement” (PTR) email address for triage and assignment (cbc-PTRteam@email.arizona.edu).
  - The PTR team will make an effort to respond to any email received before 4pm to verify it was received. Requestors can be guaranteed a response within 24 hours.
  - CBC members should feel free to contact a team member directly (contact details on next page) with any questions but be aware that all final requests will eventually be filtered through the cbc-PTRteam@email.arizona.edu email system for tracking purposes.

- If known, please include one of the following words in your subject line: PCARD, SHOP CATALOGS, TRAVEL, REIMBURSEMENT, or PURCHASE ORDER.
  - If you are unsure of the method of your purchase, don’t worry. We will direct your request to the right team member.

PTR TEAM CONTACT INFORMATION:

<table>
<thead>
<tr>
<th>Janet Perchesky</th>
<th>Casandra Sanchez</th>
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<tbody>
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<td>621-5110</td>
<td>626-1246</td>
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PURCHASING – BEFORE YOU START:

- Team members will develop and maintain tracking spreadsheets only for the purpose of seeing the purchasing process through to completion; encumbrances and expenses on individual accounts will not be tracked.
  - Labs that are currently handling their own purchasing are encouraged to continue to do so. The PTR team will also be happy to train a lab member on the use of Shop Catalogs.

IMPORTANT!! The signature of the PI/Account Owner is no longer required on purchases. As such, the PI/Account owner is asked to designate their purchase preference by selecting an option below:

**Option A:** PI/Account owner approves all expenses.
If selected, the PTR team will only process an order that comes directly from the PI/Account Owner.

**Option B:** PI/Account owner designates a lab/group/team member to place orders on their behalf.
If selected, the PTR team will process requests from the designee as if they came directly from the PI/Account Owner. (Note: Selection of this option requires PIs/Account owners to fill out a departmental signature form to put on file with the business operations office.)

**Option C:** PI/Account owner approves all lab/group/team members to make purchases.
If selected, any person associated with a lab/group/team can send a request to the PTR team but the PI/Account Owner must be CC’d on the email. (Note: These orders will be automatically processed by the PTR team. The team will not wait for a response from the PI/Account Owner.)
DETAILS TO BE INCLUDED IN A PURCHASE REQUEST SENT VIA EMAIL

**Pcard, Shop Catalogs (Buy Ways), 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)**
- **Catalog/CAS number and description**
- **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 this order include a chemical?** (*Remember, PTR team members are not scientists. Gloves and filters are obvious but chemical 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.

**DETAILS TO BE INCLUDED IN A TRAVEL AUTHORIZATION REQUEST FORM:**

To initiate the travel authorization and purchase tickets for a business trip, please email the following details to the PTR team:

1. **Account Number**
2. **Originator (Traveler)**
3. **Confirmation that the PI/Account Owner has approved the expense**
4. **Purpose of the trip**
5. **Link to seminar/meeting/conference (if applicable)**
6. **Destination with intended departure and return dates**

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).
REIMBURSEMENT REQUESTS:

Reimbursements 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. The requestor should print and complete the Reimbursement Request Form, which must be signed by the PI/Account Owner, 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 mailed to or dropped off at BSW 362.

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