

Purchasing, Travel and Reimbursements Team (PTR)

cbc-PTRteam@email.arizona.edu

Revised: 10/23/2018

Requests related to Purchasing, Travel and Reimbursement should be submitted via Purchase Request Form, Travel Request Form OR Employee Reimbursement Request Form for triage and assignment. These forms are accessible at:

- ✓ cbc.arizona.edu > Departmental Resources > **Purchase Request Form.**
 - ✓ cbc.arizona.edu > Departmental Resources > **Travel Authorization Request Form.**
 - ✓ cbc.arizona.edu > Departmental Resources > CBC Support Teams > **Employee Reimbursement Request Form.** (For reimbursement, original receipts need to be submitted to PTR within 90 days of purchase date)
- CBC members should feel free to contact the team with any questions through the **cbc-PTRteam@email.arizona.edu** E-mail system. This will help with record keeping and order tracking purposes.

PTR TEAM CONTACT INFORMATION:

Janet Perchesky BSW 364 cbc-ptrteam@email.arizona.edu 621-5110	Hannah Shoulders BSW 364 cbc-ptrteam@email.arizona.edu 626-6911
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PURCHASING – BEFORE YOU START:

- ✓ Any order placed by a lab should be tracked and confirmed received by that lab for encumbrance purposes. The packing slip should be initialed by the person receiving the delivery and turned into the business office in a timely manner.
- ✓ 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 FORM

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*)
- **Item 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 Request please submit a **Travel Authorization Request Form** with 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 (Must be related to UA Business/Research)**
5. **Link to seminar/meeting/conference (if applicable)**
6. **Destination with intended departure and return dates (Itinerary, if available)**

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 travel related items.

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.)
- ✓ Information/justification relating to “personal time” while also on UA related business/research travel
- ✓ Justification of additional, non-mandatory fees or charges incurred on travel in order to establish if the expense is allowable in regards to reimbursement.

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 international travel registration online that only the traveler can complete (the PTR team cannot perform these tasks).

EMPLOYEE REIMBURSEMENT REQUESTS:

Reimbursements can only be initiated with original receipts submitted by the purchaser/traveler. The requestor should print and complete the **Employee Reimbursement Request Form**, which must be signed by the PI/Account Owner, and submitted to PTR with original, itemized and paid 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 the OC 221 inbox or BSW 364.

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