

# Procurement Request Form Guidelines and Procedures

NC STATE

Poole College of  
Management

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## Guideline and Process for completing Procurement Request Form as of July 18, 2019

### Background & Scope

These guidelines are to clarify the requirements and process for completing the Procurement Request Form in the Poole College of Management. This form was designed to be consistent with University Policy and replaces the Receipt Template, AP107 and Personal Reimbursement forms previously used in the college.

*Note: Use of this form is **REQUIRED** by all units for all financial transactions within the college effective July 18, 2019.*

### Guidelines and Procedures

This form is designed to be completed electronically. The individual preparing the form should follow these steps:

1. Download the form and save to a location where you can easily locate.
2. Upon completion of the form either:
  - a. Save a copy to a designated folder for electronic storage.
  - b. Print a copy in order to obtain any *authorized signatures in ink* (if applicable).
3. Report any technical problems with completing the form to: pcombusiness@ncsu.edu.

#### Complete Section I

This section must be completed for ALL financial transactions related to PCards, Invoices, Reimbursements and MarketPlace.

- Enter requested information - all fields are **REQUIRED** (unless marked if applicable).
- Select appropriate financial transaction:
  - PCard (include original CPS#, if applicable).
  - Invoice (include a Late Justification, if applicable).
  - Personal Reimbursement (must complete ALL fields).
  - MarketPlace

#### Complete Section II

This section is **ONLY** to be completed if the purchase involved food and/or alcohol or is a personal reimbursement.

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*Note: Please refer to Alcohol Guidelines located on our website.*

- Food Purchase (e.g. dine in, carry out, catering and food items from a store):
  - Enter the name (first and last) of the Department Head.
  - Print copy of form in order to obtain *ink signature w/date*) from Department Head.
- Alcohol Purchase - Select location of event.
  - For On-Campus events:
    - Dean signature NOT required on the form.
    - Must attach a copy of the completed Permission Form (pre-approval).
  - For Off-Campus events or University Business Related Meals:
    - Enter the name (first and last) of the Department Head.
    - Print copy of form in order to obtain *ink signature w/date*) from Department Head. (Required prior to routing to Dean for signature)
    - Obtain *ink signature w/date*) from Dean.
- Personal Reimbursement:
  - *Non* food/alcohol related purchase:
    - Enter the name (first and last) and the title of the Supervisor.
    - Print a copy of the form:
    - Sign and date as Claimant.
    - Obtain *ink signature w/date*) from Supervisor.
  - Food/alcohol related purchase:
    - Enter the name (first and last) and the title of the Supervisor.
    - Print a copy of the form:
    - Sign and date as Claimant.
    - Obtain *ink signature (to include date)* from Department Head.
    - Obtain *ink signature (to include date)* from Department Dean (if applicable)

## Processing the Completed Form

The type of financial transaction will determine how to process the completed form:

- PCard - Upload form via the PCard Center to corresponding transaction, either as a:
  - Cover sheet (preferred) along with detailed/itemized receipt and any supporting documentation.
  - Separate attachment.
- Invoice (Small Purchase Voucher & PO) - Include form when requesting payment on an invoice, regardless if submitted to your unit or OBS.
- Personal Reimbursement - Include form with detailed/itemized receipt and any supporting documentation when requesting reimbursement, regardless if submitted to your unit or OBS.
- MarketPlace - Upload form via the Header Comment Section *prior* to placing order.