

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.
- If you plan to be reimbursed for the items in the request, see Step Eight.
- 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"

The screenshot shows the GetInvolvedUC dashboard. On the left, a navigation menu is open, with the 'Finance' option highlighted in yellow. A red arrow points to the 'UFB' icon in the menu. The main content area displays 'Explore University of Cincinnati' with various announcements and event listings.

Step Three:

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

The screenshot shows the 'Purchase Requests' page. The 'CREATE REQUEST' dropdown menu is open, and the 'Create Purchase Request' option is highlighted in yellow. The page also features search and filter options for budget, status, stage, and category.

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. 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.
 - **See Step Eight**
- 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 required "Subject" field, a "Description" field, a required "Requested Amount" field with a "\$ 0" value, and a required "Categories" dropdown menu. The dropdown menu is open, showing options: "Administrative", "Approved Budget", "Operating Funds", "Reimbursement", and "Yearly Allocation". The "Account" field is also visible 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 on the left includes fields for 'Submitted By' (with a user icon 'T'), 'Organization' (with a user icon 'S'), 'Request Title', 'Request Description', and 'Additional Questions'. The right sidebar shows the 'No Unsaved Changes' status and a 'Status' dropdown set to 'Canceled'. The 'Stage' dropdown is highlighted with a yellow box and set to 'Treasurer Review'. Below it, the 'Category' dropdown is set to 'Administrative'. At the bottom, the 'From Account' and 'Balance' (\$ 0.00) are displayed. A 'Reviewer Comment' section is also highlighted with a yellow box, showing an 'EDIT' button and the text: 'Editable memo visible to anyone who can view this request' and 'No reviewer comments'.

Step Eight: Reimbursements

If you plan to be reimbursed for the items in a purchase request, please ensure the following steps are completed:

- Purchase Request Category is set to “Reimbursement” (see step four)
- **The Purchase Request MUST be approved by your organization’s treasurer and advisor BEFORE you purchase any items.** Once your Purchase Request is at the “Financial Admin Review” stage, you may purchase your items.
- Fill out the [Organization Reimbursement Request](#) within 15 days of making the purchase
 - Provide the information of the person to be reimbursed
 - Upload your itemized receipt(s)
 - Upload a screenshot of the transaction posted on the card. The screenshot should include the following:
 - Item/vendor name
 - Transaction amount
 - Date of purchase
 - For food reimbursements you will need the following additional information:
 - An event flyer stating food is available or a list of attendees
 - For travel reimbursements you will need the following additional information:
 - Completed [Travel Authorization and Roster](#)

Organization Reimbursement Request

Reimbursement Request

Reimbursement Requests should be submitted within 15 days of an approved purchase.

This form is for organizations seeking reimbursement for operating costs or for a line item within an approved budget. No purchase for reimbursement should be made until you have had a purchase request approved by the organization treasurer and advisor. Failure to get approval before making a purchase can result in not receiving reimbursement.

* Please provide the approved Purchase Request number for the request associated with this reimbursement. The request number can be found on the top left of the form.

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Purchase Request: 002083