**2013-2014 Business Procedures**

**Kastle Hall IBU  
Email: kasfinance@uky.edu**

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| Lori Eckdahl | College Budget Analyst Lead | 257-8659 | 124 Kastle |
| Pam Stephens | Financial Analyst Senior | 257-9219 | 125 Kastle |
| Diane Griffieth | Financial Analyst | 257-6843 | 124 Kastle |
| Pamela Webb | Financial Analyst (Travel Focus) | 257-9219 | 125 Kastle |
| Kristen Southerland | Grants Analyst | TBD | 116 Kastle |

**On-line forms**  
You need to be logged in with your link blue ID and password to fill out/submit forms.

**A&S Requisition form:** Use this form for making purchasing requests  
Michelle can provide your cost center number if you need it.  
<http://staff.as.uky.edu/requisition-form>

**A&S Travel form:** Complete this form for travel requests.   
This form should be completed **before** making travel arrangements.  
<http://staff.as.uky.edu/travel-form>

**Procedures**

***Please keep in mind that the policies/rules regarding purchases and travel have not changed. Only the procedures for making purchases/travel arrangements have changed. Please refer to the travel reference guide for policies regarding employee travel.***

* **Procard:** The department will no longer have an in-house departmental procard. The IBU now manages procards. If you need to borrow a procard to make a store purchase (i.e. Kroger), you can check out a procard from the IBU. You will need to pick up/return the procard to 125 Kastle Hall and also fill out a requisition form (you can print out the online requisition form or fill one out at Kastle Hall). Please call/email prior to picking up the card to make sure a card is available to be checked out. Please submit an itemized receipt when you return the procard. **Reminder: UK is tax exempt.**
* **Purchases:** All purchase requests (with the exception of computer purchases) should be submitted to the IBU by either (1) filling out the requisition form, or (2) emailing a request to [kasfinance@uky.edu](mailto:kasfinance@uky.edu). **After your order arrives, please give Michelle the packing slip. Packing slips need to be submitted to IBU as proof of item delivery.**
* **Amazon**: The department will keep its corporate Amazon account, however the process for purchasing is different. **Before** you purchase books/films on Amazon, you must fill out an online requisition form providing a purpose for the purchase, account to charge, and a brief description of the items you will be purchasing (you can just state that you are purchasing books/films without detailing the titles), and an estimate of the cost. Once you receive approval from the IBU, you can then go onto the Amazon account and purchase the books/films. The receipt will automatically be sent to the IBU. If you prefer to have the IBU place the order for you, then you can (1) fill out the requisition form, provide the details for the specific item you want to purchase, and state that you would like the IBU to place the order, or (2 )you can email your purchase request to [kasfinance@uky.edu](mailto:kasfinance@uky.edu) and provide the items to order and the account to charge.  **After your order arrives, please give Michelle the packing slip. Packing slips need to be submitted to IBU as proof of Amazon delivery.**
* **Travel (before trip):** Fill out the travel form and make sure to fill out all sections of the form including the estimated expenses. Once your request is received, Pam Webb or another IBU staff member will contact you to make travel arrangements for expenses that can be prepaid on the procard (airfare, conference registration, lodging, etc…)
* **Travel reimbursement (after the trip):** Within two weeks of your return, please submit documentation for reimbursement. You can submit receipts and travel reimbursement form by (1) taking documentation directly to the IBU travel office in 125 Kastle Hall, (2) placing documentation in a campus envelope and drop it with a GWS student assistant, (3) provide Michelle with documentation and she will forward it to the IBU. Please remember to submit all necessary documents (travel reimbursement form, original receipts, conference schedules/agendas, registration form, etc…). If more documentation is needed to process your reimbursement, the IBU will contact you.
* **PRD’s for Dept. event meals**: As soon as you know the date and restaurant for the event meal, please let Michelle know and she will submit a request to the IBU to create a PRD. The IBU will email a PDF copy of the PRD to be printed and submitted to the restaurant. If Michelle is out of the office, you can send a PRD request to [kasfinance@uky.edu](mailto:kasfinance@uky.edu). After the meal, **an *itemized receipt*** and ***a list of all attendees*** should be submitted to Michelle or the IBU so that the restaurant can be paid. ***Reminder: Alcohol is not permitted on PRDs. Any alcohol purchases need to be approved first and paid with personal funds on a separate receipt. You will then be reimbursed for the purchase.***
* **Catering:** Please work with Michelle to complete a catering request. She will forward the catering invoice to the IBU, so they can log the expense.
* **Visiting Speaker Travel Arrangements:** Please work with Michelle to arrange visiting speaker travel. If Michelle is out of the office, you can contact Pam Webb or Pam Stephens to set up lodging reservations for the speaker (please provide guest name, dates of stay, name of hotel, any special requests, and account to charge). For speaker airfare, the guest can either call AAA or Avant to set up airfare. AAA/Avant will call IBU staff for approval and payment. Please inform IBU that guests will be making airfare arrangements, so they can expect the call from the travel agency for approval & payment.
* **Payments for services; Independent Contractor Payments (translators, editors, speaker fees, etc…)** Please work with Michelle before you hire an independent contractor to make sure funding is in place and to fill out the necessary paperwork for these types of payments***.*** There is paperwork to fill out before & after the service or work is completed.