Administrative workflow – FAQ

1. ***Q: Are the purchases made on grants, overhead and foundation funding treated differently?***

 A:
   a) Purchases made from grant funds: must have the purchase form (pre-approvals) regardless of dollar amount.
   b) Purchases made from HSCFCPA, overhead or Foundation/CAM (Fund 171):
      i. If totaling $25 or less, the purchasing form (pre-approval) is not required. The documentation regarding these purchases must be maintained in the usual manner. If the source of funding for the purchases under $25 is not specified by the requestor, please email aging-grants@ufl.edu for this information.
      ii. If totaling over $25, purchasing, reimbursements or travel request forms should be submitted prior to any purchase/service, including postage, large copy jobs, travel/travel recruitment, food for meetings, FedEx, etc.

2. ***Q: I have to complete a purchase request, but I am not sure what the exact amount is.***

A: If the exact cost of the purchase or travel is not known at the time the request is submitted, please estimate the amount and submit the appropriate form in the usual manner.

3. ***Q: I have submitted a purchase/travel/reimbursement request form. The form was completed correctly and signed at the time of submission. When can I expect to receive it back from the Aging Grants Team with the chartfields fields completed?***

 A: The Aging Grants Team will make every attempt to budget check the forms and assign chartfields within 1-2 business day. Delays may take place if there are issues with funding, or a backlog. If any request in urgent, please specify this by typing **"URGENT"** in the subject title of the email when you submit this to the Aging Grants Team. Adding an explanation in the comments section on the nature of the urgency will be helpful.

4. ***Q: I am a member of the purchasing/travel processing team. What do I do if someone is approaching me and asks me to complete a task that is not assigned to me, and I do not know whose duty it is?***

A: Please review the Phone and Administrative Assignments list provided to you; the third page contains the assignments for the most common requests. If you do not find the answer in these documents, please call Camelia, Kristie or Connie.

5. ***Q: When should a travel request form be completed?***

A: Every time a Travel Authorization (TA) is needed, all the travel-related expenses and reimbursements requests should be submitted on the travel request form.

6. ***Q: When should a reimbursements request form be completed?***

A: The reimbursement request forms are intended for any purchases that were already completed by using personal funds such as personal credit cards (examples: cell phone purchases, journal abstracts submissions, dinners for faculty recruitments or visiting faculty, geriatric fellow candidates travel reimbursements). If the reimbursement is related to travel for which we did not have to complete a Travel Authorization (TA), then it is appropriate to complete a reimbursement form.

7. Q: When should a purchase request form be completed?
A: Purchase request forms are completed for all purchases that do not fit the reimbursement category (please see question # 6)

8. Q: What type of form must be completed if we only purchase a conference registration?
A: If we had to complete a TA, then a travel request form should be completed. If a TA was not needed, then a purchase form is appropriate. This applies to any travel-related transaction.

9. Q: I have completed a purchase. What do I do with the paper copy of the signed purchase request?
A: Everyone should be signing and submitting the forms electronically. If, however, some signatures are obtained on paper, the forms can be held by the purchaser along with the other related paperwork until further notice.

10. Q: Should the signatures be obtained on the purchase and travel forms prior to submission to the Aging-Grants Team?
A: Yes. Having the signatures on the form before submission will speed-up the purchase or travel process. The preferred method for signing the forms are the certified Adobe e-signatures, but scanned copied of hand-signed forms are acceptable. If the signatures are not obtained prior to submission, they will be returned to the requestor or division manager, which will delay the completion of the request.

11. Q: How do I set up my electronic signature, and how do I use it after this?
A: Please follow these steps:
1. Open .PDF document to be signed.
2. Select the "Tools" Menu
3. Select "Sign & Certify"
4. Select "Sign Document'
5. Follow prompt to place signature.
6. In the dialog that opens choose "A new digital ID I want to create now", and click the "Next" button
7. Choose "New PKCS#12 digital ID file", and click the "Next" button
8. Fill in your name and email, leave all other fields blank and dropdown menus at their starting position, and click the "Next" button
9. Select a file location to save the E-Signature on your personal drive (not on your desktop) and enter a password, and click the "Finish" button. Make note of your password as it will be needed each time you sign

10. Enter your password to place the signature on the document, and click the "Sign" button. Do not select the "Lock Down After Signing" option
11. Save the document; once saved, the signed document can be emailed to the next recipient.

How to use the signature after it was set up:
1. Open .PDF document to be signed.
2. Select the "Tools" Menu
3. Select "Sign & Certify"
4. Select "Sign Document' and follow the prompts to place your signature. You will need the signature's password.
5. Save the document in the location of your choice; you can then email the document for further signatures or processing.

12. Q: How do I submit the completed and signed purchase and travel forms to the Grants Team?

A: Please submit by emailing the signed forms to aging-grants@ufl.edu. Do not hand the actual signed forms or receipts to anyone in the grants, purchasing or travel teams. Scanning and emailing this documentation is mandatory. Also, please do not ask the Aging Grants Team for the chartfields. Instead, enter the funding name on the form, for example "LIFE Field Center", "Clinical Research Division", etc., and the Aging Grants Team will assign the chartfield after receiving the form.

13. Q: Who is submitting the purchase and travel forms?

A: The requestor, the division manager, or their proxy. Typically, the forms are not submitted by the financial team or the purchasing team.

14. Q: Who is responsible for obtaining the signatures on the forms?

A: The top and bottom signatures (the fields marked with stars) are obtained by the division managers, their proxy or the requestors prior to submitting to the Aging Grants Team. Emails from the appropriate approvers stating that they approve of the expenditure are also acceptable. If unsure of who should be the approver, please call Camelia, Connie or Kristie. The Aging Grants Team will verify that the funding is available, will sign the middle section and will submit to the appropriate processor.

15. Q: I have to make a purchase involving negotiations, and/or multiple product reviews and approvals. How is this handled?

A: Complete the purchase form, obtain the signatures and submit it to the aging-grants@ufl.edu list serv. Specify on the form that, due to its complexity, you need to be the person completing the purchase. The Aging Grants Team will complete the payment chartfields, sign the middle section, and return the form to you. The purchase will be paid by the P-Card holder in your division.

16. Q: Is it OK to use personal credit cards?

A: Yes, for food/meals related to faculty recruitment or meetings with a UF business purpose. Use of a personal credit card for any other work-related expense (supplies,

equipment, etc.) is only acceptable in case of emergency, and the cardholder (not the purchasing team) must handle all related transactions such as refunds, rebates, or returns. Itemized receipts will be required for reimbursement.   The reimbursement will require the completion of a purchase form with a justification for using the personal credit card in the Comments section.

17. Q: How are recruitment meal purchases handled?

A: The meals purchased in restaurants during recruitment-related dinners are paid with personal funds. The recruitment meal reimbursements are obtained by completing the reimbursements for, obtaining the signatures, and submitting it to the aging-grants@ufl.edu list serv.   The detailed receipt must be provided (by scan/email) for reimbursement along with the signed reimbursement form.

18. Q: How do I proceed if I need to mail a large packet, or for mass mailing?

A: Mailing which will cost in excess of $25 is handled the same way as a purchase: complete the purchase form, obtain the supervisor signatures and submit to aging-grants@ufl.edu.

19. Q: How are fixed recurring purchases (such as pagers, cleaning, coffee, Cintas, ports) and variable recurring purchases (such as Mr. Paper, copier charges) handled?

A: Email Connie a "blanket" purchase request based on the average cost per month. Estimate the annual cost and include the amount on the form. If the cost for a single month is significantly greater than the estimate, justification will be required.

20. Q: I am a member of the purchasing team and I have received a completed purchase form. When I made the online purchase, I had to choose a different vendor and the purchase amount changed. Does the requestor have to submit an updated purchase form?

A: Not unless the cost if higher by more than $25. If the cost is higher by more than $25, please contact the Aging-Grants Team for email confirmation that the additional funds are available. Please always use contracted vendors, unless their price is higher than a non-contracted vendor's, in which case it is acceptable to use a non-contracted vendor.

21. Q: I was asked to pay for a membership, or abstract submission fee by P-Card. How do I handle this?

A: Submit the signed purchase form to the aging-grants@ufl.edu list serv, listing an estimated amount needed for payment.

22. Q: I am a member of the purchasing team, and was asked to purchase an item that is available at the UF Bookstore. How do I proceed?

A: Once you have the signed purchase form, use one of the golf carts available for in-campus transportation, and use the P-Card to complete the purchase. If you are not able to go to the bookstore, please contact Camelia for alternatives.

23. Q: I am the division or program manager, and I was informed that my division chief has invited a faculty candidate for an existing position, or a seminar speaker. What are my responsibilities?

A: Verify with Lauren if this speaker was approved by the division chiefs. Then, work with your division chief on putting together an itinerary for the speaker or candidate. Confirm all the appointments in the itinerary. Submit the signed travel request for processing in the usual manner. Maintain contact with the visiting faculty travel processor to make sure that all the elements of the visits are scheduled properly (flight, car rental, hotel, lunch for the seminar, transportation and guide on campus, taxi for departing to the airport after hours, etc.). You as the division manager will be the main liaison with the faculty candidate, and will ensure that the proper reservations, payments, arrangements, reimbursements are performed and confirmed by the travel processor. It is the division manager's responsibility to oversee the travel processor's work related to this recruitment, and to ensure that the visit takes place flawlessly.

24. Q: We have received a reimbursement request for a VA GRECC luncheon. How is this handled?

A: The division manager/proxy completes and obtains the approval signatures on a purchase form and submits it to the Aging Grants Team. It will be processed by the purchaser assigned to the paying fund.

25. Q: We have received a reimbursement request for a current clinical fellow reimbursement. How is this handled?

A: The division manager/proxy completes and obtains the approval signatures on a purchase form and submits it to the aging-grant@ufl.edu list serv. It will be processed by the purchaser assigned to the paying fund.

26. Q: We have received a reimbursement request for a visiting clinical fellowship candidate. How is this handled?

A: If travel arrangements are needed, the division manager/proxy will submit the signed travel request to the aging-grants@ufl.edu list serv. It will be processed by the employee assisting with travel for visiting faculty.

If travel arrangements are not required, then it will be treated like a reimbursement: the division manager/proxy submits a signed reimbursement form to the aging-grants@ufl.edu list serv. It will be processed by the employee assisting with visiting faculty.