

OFFICE OF RESEARCH STAFF GUIDE TO SUBMITTING REQUISITION REQUESTS

GENERAL RESPONSIBILITIES

All staff are responsible for familiarizing themselves with UF, COM, and OR procurement processes and policies to ensure all financial transactions are allowable, justifiable and appropriately approved prior to execution. This process applies to all staff employed at OR. Further information and training can be found on the UF Procurement website.

It is the responsibility of the OR Leadership Team and OR Administrative Assistant to ensure compliance with this procedure and to provide training for all OR staff responsible for performing this SOP.

DEPARTMENTAL HR & SUPERVISOR RESPONSIBILITIES

Approving a procurement request is certifying that you have engaged in communication with your staff regarding this purchase, including any logistics, and authorize this purchase as justifiable, reasonable, and in line with UF, COM, and OR procurement policies.

OFFICE PROCEDURES

4.1 All requisition requests must be made using the Requisition Request Form. This form can be found on the Office of Research website under “Department Resources”. Once submitted, Requisition Request Forms will be routed to the staff member’s direct supervisor and/or the OR Administrative Assistant to begin the approval process*.

4.2. The Requisition Request Form divides requisitions into three categories: Standard Requests, Special Requests and Travel/Training Requests.

4.2.1 Standard Requests are intended to include items likely to be found in the supply closet (pens, paper, tape, etc.) that may simply need replenishing.

4.2.2 Special Requests are intended to include items not likely to be found in the supply closet, items that are unique, incur a larger cost, and/or require additional steps to be functional (such as computers, phones, software licenses, whiteboards). Justification and logistics need to be discussed and planned prior to submitting a Requisition Request Form for these items. The

detailed justification and plan must be submitted in the logistics section of the Requisition Request Form. A Dean's Office Expenditure Request Form (DOER) must be attached to all Special Requests to be considered complete. This Form can be found on the Requisition Request Form page. The OR Administrative Assistant will review your request and if approved, will complete the DOER by entering Cost Center and Signing.

4.2.3. Travel/Training Requests are intended to include travel costs, including but not limited to, costs incurred by virtual and in-person conference/seminar/training registration fees, hotel reservations, and reimbursements. A completed Professional Development Opportunity Request Form (PDOR) and a DOER must be attached to all Travel/Training Requests to be considered complete. **Please note that once approved, all staff are expected to manage their own travel in the new UFGO Travel System.**

**Completion of the final approval stage does not guarantee that your requested item will be purchased immediately. Some vendors may impose a minimum cost to complete a purchase and as such purchase requests may be queued at the OR Administrative Assistant's discretion until the minimum requirement is met.*

Employee Signature

Please route signed SOPs to the OR Administrative Assistant at s.sprague@ufl.edu