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| **CEP Procurement Process – For Purchasing / Travel & Entertainment Reimbursement / Catering** |
| **Procurement Transaction Type** | **Employee Action(s)\*** | **Approver Action** | **Program Procurement Lead Action** |
| **Purchasing (of supplies or items)** | Send email to Program Approver requesting the purchase of items (be specific so that order can be placed) | Forward email response (approving or denying) of purchasing request to **\*both\*** employee and Program Procurement Lead with a program chartstring or fund name to be charged for expense if approved | Enter purchase request into BearBuy with chartstring indicated by Program Approver and attach email as electronic approval |
| **Travel Reimbursement\*\*** | Provide original receipts in chronological order to Program Procurement Lead and set up a time to sign completed Travel Reimbursement Claim Form. | Provide a chartstring for the travel reimbursement claim form to Procurement Lead and signs completed Travel Reimbursement Claim Form | 1. Fill out the appropriate travel reimbursement claim form and get an **\*original signature\*** from both the Employee and Program Approver on the form, scan it in so that you may attach it
2. Attach the scanned forms & receipts to a correctly formatted BearBuy cart with a correct chartstring and submit
3. Provide hard copy of travel packet to Org Node Approver (Rhonda Robinson)
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| **Entertainment Reimbursement\*\*** | Provide original receipts in chronological order to Program Procurement Lead and set up a time to sign completed Entertainment Reimbursement Claim Form. | Provide a chartstring for the entertainment reimbursement claim form to Procurement Lead and signs completed Entertainment Reimbursement Claim Form | 1. Fill out the appropriate entertainment reimbursement claim form and get an **\*original signature\*** from both the Employee and Program Approver on the form, scan it in so that you may attach it
2. Attach the scanned forms & receipts to a correctly formatted BearBuy cart with a correct chartstring and submit
3. Provide hard copy of travel packet to Org Node Approver (Rhonda Robinson)
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| **Catering / Food** | Send email to Program Approver requesting catering **in advance** (be specific so that order can be placed) | Forward email response (approving or denying) of request to **\*both\*** employee and Program Procurement Lead with a program chartstring or fund name to be charged for expense if approved | Enter purchase request into BearBuy with chartstring indicated by Program Approver and attach email as electronic approval |
| **Pre-Approvals** | Email your Program Approver with a proposed amount and purpose of your request and justification – you need an affirmative response from your Program Approver **before** you move ahead with your purchase | Forward approval or denial of pre-approval to **\*both\*** employee and Program Procurement Lead with chartstring or fund name to be charged when action taken |  |

\*If your program or department requires pre-approval for a purchase or reimbursement, start with the pre-approval transaction type

\*\*If a Program Manager is submitting for reimbursement, approval goes to Executive Director