

## **Purchasing Approval Request (PAR) Instructions**

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### When to Submit a PAR

This request should be submitted for all **non-travel-related purchases** which includes:

- PCard
- Marketplace
- Invoices
- Non-travel related reimbursements

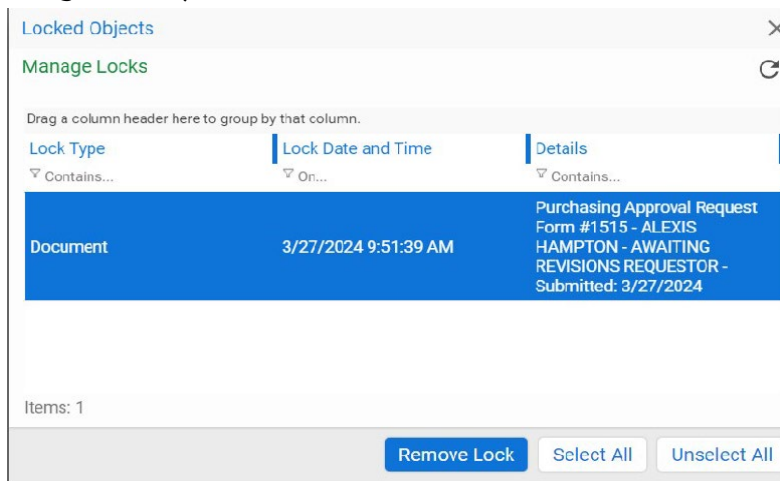
### **All travel routes through UFGO.**

Web URLs (embedded in link): [PHHP Purchasing Approval Request](#) or [go.ufl.edu/par](https://go.ufl.edu/par)

### Important Information

Note the following before and after submitting a request:

- When bookmarking an OnBase link in your browser, you will need to edit the bookmark URL and copy and paste the full link ([go.ufl.edu/par](https://go.ufl.edu/par) and <https://docs.erp.ufl.edu/appnet/UnityForm.aspx?d1=Ad8aBNczqh%2fa3VU0n9Tp7n%2faawqOPhjkZlnEiarahl2YwOhjGi5yoMTeMlhWEoLTdf4aOyONFOQb5726vOUwHZS8jgTz7g%2bePgHtWj7qX6V5H1ax2kUig1fkyTo%2b0t%2bXel3fhfv4U%2bkwXZKUAib5Don9Fu8stOPwJhnK7yC2vklrkhyiOv7D%2btH2bGB9mHg%2f3iN1oKLZLlpLRvOkGx7leO8%3d>).
- You must be connected to the VPN or on a computer that is connected to the campus network to access the PAR.
- Gatorlink login is necessary to access the PAR.
- **Clear cache and cookies by selecting the All Time range, close out all open browser tabs, and allow pop-ups in your browser.**
- After a request is submitted or revised, you must close any browsers associated with the request completely. If this is not completed the form will be locked and unable to be processed.
- **To remove a locked request**, log into the web client here <https://docs.erp.ufl.edu>. A box will pop up showing locked objects with the option to remove the lock (see image below). Select document then select remove lock.



### **Retroactive Request**

Select box if this request is retroactive for already purchased items. Example: urgent items purchased from the Fisher store.

### **Requestor Information**

1. Enter your UFID. Press tab on your keyboard. Your name and department information will auto-populate. **NOTE: \*\*If your information does not populate when entering your UFID, insert the name of the fiscal staff member supporting the transaction in the, "Are you requesting this purchase on behalf of someone else?" field.**
2. Are you requesting this purchase on behalf of someone else?  
(Be advised that an email will be sent to both the requestor and the person for whom you are requesting)
  - a. Within the dropdown menu, select Yes or No. \*\*\* If yes, a new information section will appear to select the requestor's name. Begin entry of the last name, a comma, and first initial (no space between comma and first name); e.g.: smith,j. Select the name of the person you are requesting on behalf of.
3. Select a "Unit Requesting Purchase" option from the dropdown menu.

### **General Purchase Information**

1. Request Title.
2. Is this a recurring charge? (Recurring charges are routine goods or services on a prearranged schedule i.e., monthly phone bill, Xerox, etc.)
  - a. Recurrence End Date – Select the date the recurring charges will end.
  - b. Expected Frequency – Select frequency of charges: Weekly, Biweekly, Monthly, Quarterly, Semesterly, or Other. If Other is selected indicate the frequency in the Other field.
3. Do you have a PCard that you intend to use? Select Yes or No from the dropdown menu. **(All PCard holders will be responsible for providing appropriate backup documentation to UFGO delegates, including the preapproval, invoice, and receiving documentation.)**
4. Is this purchase sponsored externally by an agency such as NIH, DOD, or non-UF Foundation?
  - a. Select Yes or No from the dropdown menu.
  - b. Hint: IDCs and startup funds are internal not external funds.
5. Is this a request for personal reimbursement?
  - a. Select Yes or No from the dropdown menu.
6. Description of Funding Source(s):
  - a. If the purchase is research related, please enter the project name or number.
  - b. If the purchase will be paid from multiple sources, identify the corresponding percentage or amount of the purchase associated with each funding source.

7. Shipping Location
  - a. Select an address from the dropdown menu.
  - b. Be sure to fill out each field in this section. Amazon purchases require a P.O. Box number if the shipment is to a Gainesville campus location.
8. Is this an urgent request? Within the Dropdown menu, select Yes or No. **Contact your fiscal staff for urgent requests.**
9. Date Needed By:
  - a. Select a date from the calendar selector. Please allow 2-3 business days for approval and 2-3 business days for processing.
10. Business Purpose (Benefit to UF):

From the dropdown menu, select Administration, Clinical, Instruction, or Research.
11. How does this purchase support your research and/or department?
  - a. Please use the free-text box to explain. Examples include:
    - i. Reagent required for immunological based inquiry of sponsored research samples.
    - ii. Toys to be used as compensation for participants as per approved study protocol.
    - iii. Oxygen tanks to be used during tissue harvests.
12. If a risk assessment is required and you have been provided a risk assessment number from UF Information Security, please enter here. If a risk assessment number is not required, please leave this field blank.

### **Item Information (\*required item)**

1. **Type\***: from the dropdown menu, select one of the following:
  - a. Good/Item
  - b. Software
  - c. Service
  - d. Computing Device/Cell Phones/Cloud Services (This selection will route through PPHP IT for review)
2. **Vendor**: enter the vendor's name
3. **Manufacturer Item Number**: enter if known from the manufacturer/vendor website
4. **Description\***: enter description of item (*Example: paper, pens, oxygen tank, etc.*)
5. **Quantity\***: enter number of items being purchased
6. **Est Price Per Unit\***: enter price per item
7. **Hyperlink**: type or paste a hyperlink to the item requested for purchase
8. **Line Item Comments**: please enter any additional information you feel necessary for the related item

### **Comments**

This section allows for any additional information you feel is necessary related to your purchase request.

1. **Date**: automatically generated with comment entry
2. **Author**: automatically generated with comment entry

3. **Comment:** enter your comment(s) here

**Attachments**

Please attach any supporting documentation here. Examples include, but are not limited to, emails, quotes, invoices, receipts, signed and dated packing slips, sole source justifications\*, risk assessment\*\*, or supporting documentation. Attachments can be uploaded to a request at any time, even after the request has been processed.

**\*Sole Source Justifications** are for items or services that are only available from a single vendor, regardless of its price. This may be due to uniqueness, recent technology (potentially under patent protection), etc. Sole source justifications are not because of pricing, expedient delivery, and/or preference.

**\*\*A Risk Assessment** may be required for hardware, software, cloud services, applications, and/or services (new or renewal) requiring network connections, migrations, upgrades, and/or enhancements. All requests are reviewed for the following criteria: security, privacy, and alignment with the university’s technology goals.

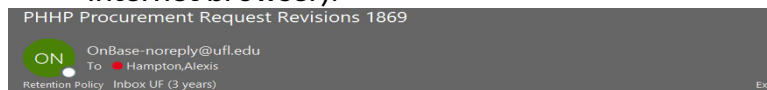
**Submit Option**

1. Select Save for Later or Submit Now from the dropdown menu.
2. Click “Submit”
  - a. You will receive an email confirmation with a link to your request.
  - b. Once submitted, no changes can be made to the request unless revisions are requested. Attachments and comments may be added at any time to a request.

**Request for Revisions**

Periodically, a request for revisions will be necessary. When this action is selected by a member of the fiscal team, an email will be sent to the requestor indicating the requested revision. Upon receipt of the email

1. Click the embedded link to access your request (be sure to allow pop-ups within your internet browser).



This is a notice that the PHHP - Purchasing Approval Request Form #1869 requires revisions for the following items:

test request for revisions

You may retrieve and edit this request via the direct form link below:

<https://docs.erp.ufl.edu/appnet/Workflow/WFLLogin.aspx?LifeCycleID=295&QueueID=538&DocID=47038964>

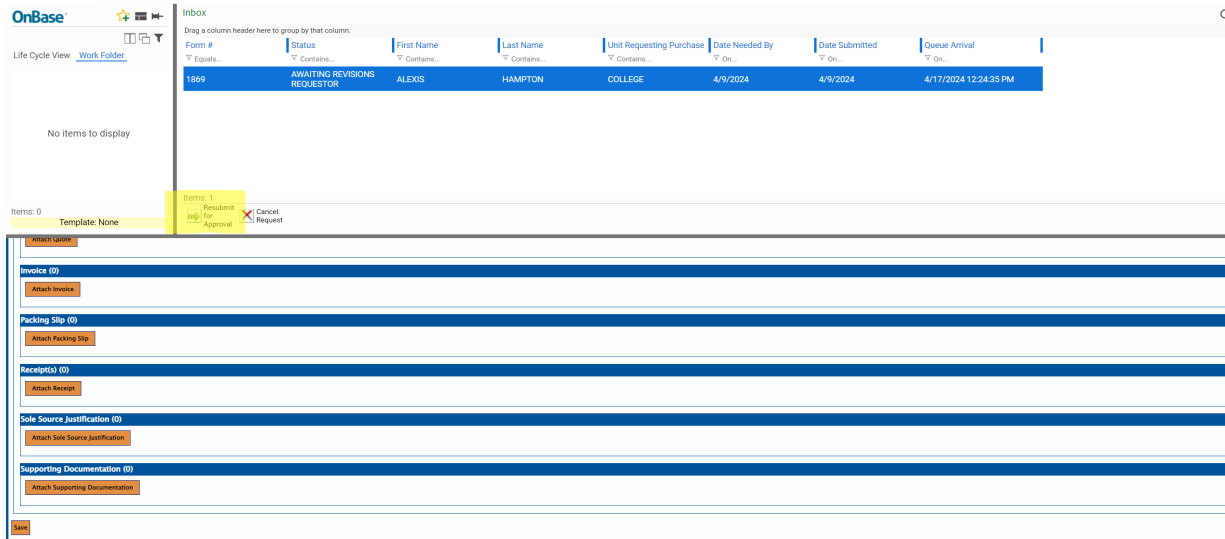
When the form opens, follow these steps:

1. Make the requested modification(s)
2. Click the **Save** button at the bottom of the form
3. Click the **Resubmit for Approval** button above the form
4. List all revisions made in the box that will appear above the form and press **Submit**
5. The form will disappear from the window.

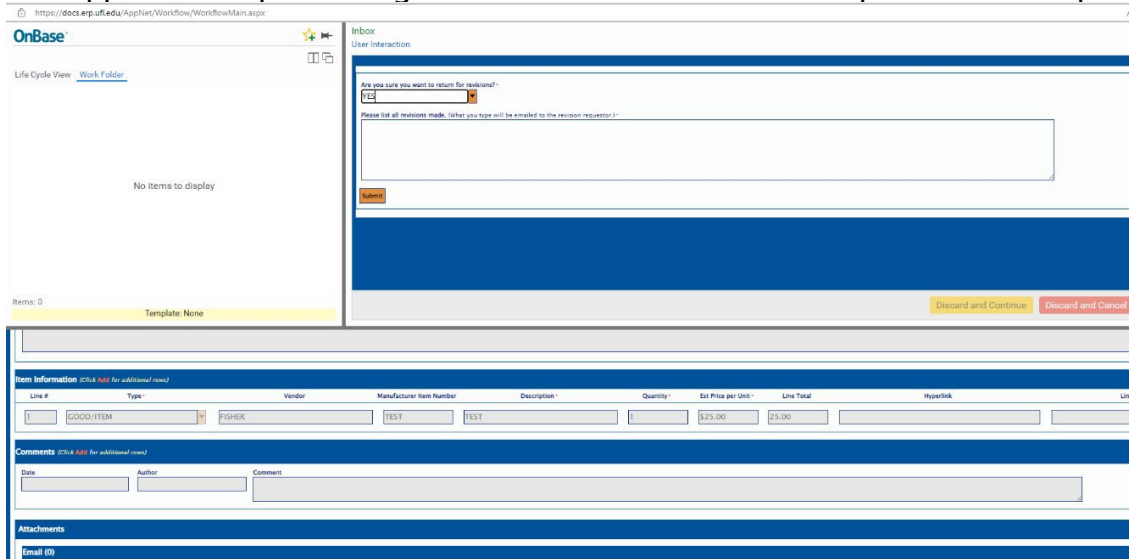
Alternately, you can choose to cancel your application by clicking the **Cancel Request** button above the form.

Please contact the appropriate [team member](#) with any questions.

2. A new window will open showing the request (see image below).



3. Select your revised request (blue highlight in the image above).
4. Make the requested revisions, then click save (on the bottom left of the form).
5. Select Resubmit for Approval (see yellow highlight in the image above).
6. As shown below, you will have the ability annotate your revisions within the text box, select “Yes” from the dropdown menu for the question “Are you sure you want to return for revisions?” then click submit. Your request is now resubmitted for approval and processing. Close the browser after this step has been completed.



**Custom Email**

You may receive a custom email related to a specific request. When this action is selected, a custom email will be sent to the requestor. Custom email details can be viewed within a request by clicking on the notes at the bottom left of the request (see highlight in image below).

Custom Query Results

Drag a column header here to group by that column.

Date Submitted	Form#	Status	Item Type	Item Vendor	Item Description	Item Quantity
4/8/2024	1832	FISCAL REVIEW	GOOD/ITEM	PUBLIX	NAPKINS, PLASTIC WARE, CUPS	1

Items: 1696

**Email (0)**

Attach Email

**Quote (0)**

Attach Quote

**Invoice (0)**

Attach Invoice

**Packing Slip (0)**

Attach Packing Slip

**Receipt(s) (0)**

Attach Receipt

**Sole Source Justification (0)**

Attach Sole Source Justification

**Supporting Documentation (0)**

Attach Supporting Documentation

Save

1 Note(s)

**Access Submitted Requests**

Use this link to access all the requests you have submitted:

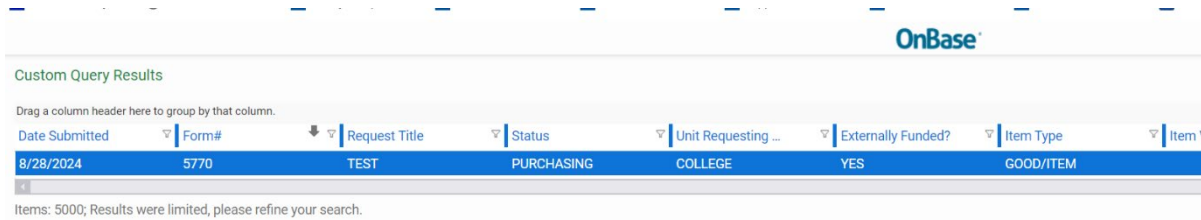
<https://docs.erp.ufl.edu/AppNet/docpop/docpop.aspx?clienttype=activex&cqid=287>

**Buy Again Feature**

Use this feature to copy a previous request that has been fully processed in the PAR.

1. Click on this link to access all the requests you have submitted:  
<https://docs.erp.ufl.edu/AppNet/docpop/docpop.aspx?clienttype=activex&cqid=287>
2. Select the PAR you would like to copy by double clicking on the request.

3. Select Buy Again on the top left of the request under Purchasing Approval Request(see image below).



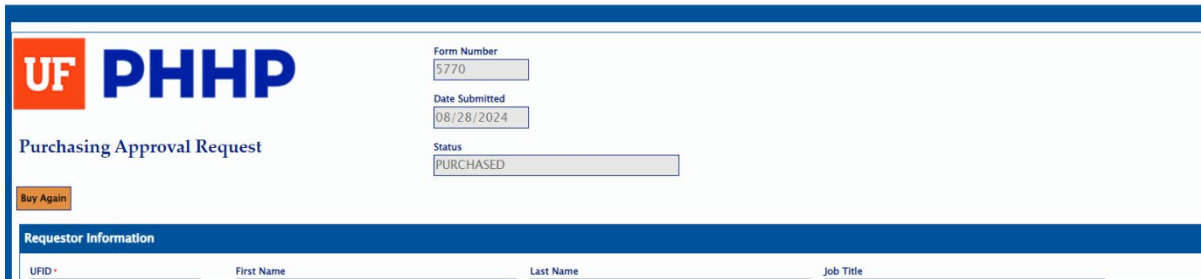
OnBase

Custom Query Results

Drag a column header here to group by that column.

Date Submitted	Form#	Request Title	Status	Unit Requesting ...	Externally Funded?	Item Type	Item V
8/28/2024	5770	TEST	PURCHASING	COLLEGE	YES	GOOD/ITEM	

Items: 5000; Results were limited, please refine your search.



UF PHHP

Purchasing Approval Request

Buy Again

Form Number: 5770

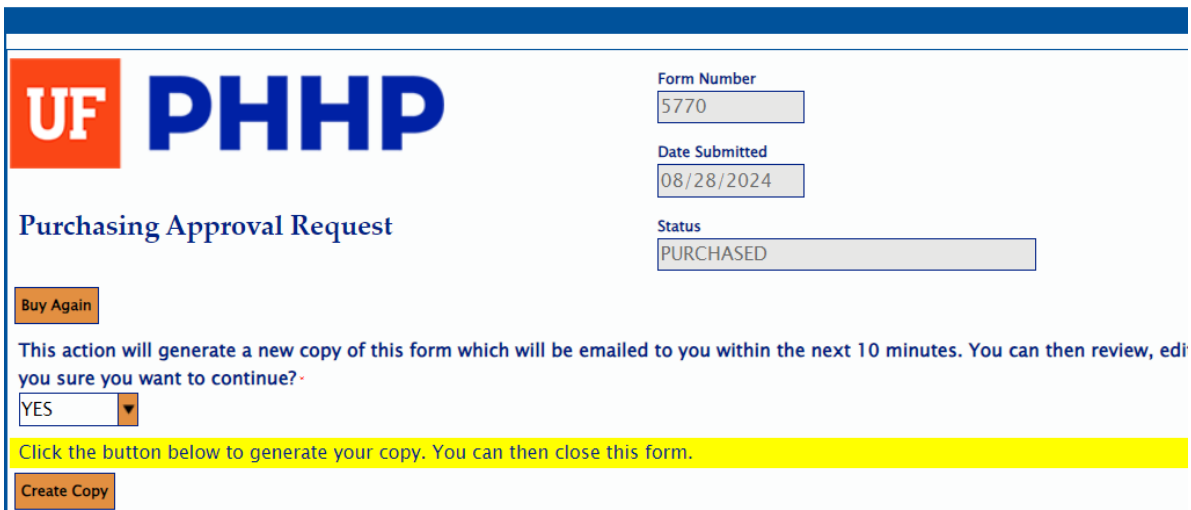
Date Submitted: 08/28/2024

Status: PURCHASED

Requestor Information

UFID: \_\_\_\_\_ First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

4. You will then see a drop down that says, “This action will generate a new copy of this form which will be emailed to you within the next 10 minutes. You can then review, edit, and submit your purchase request. Are you sure you want to continue?” Select yes or no from the drop down.
5. Click the button below to generate your copy (see image below). You can then close this form.



UF PHHP

Purchasing Approval Request

Buy Again

Form Number: 5770

Date Submitted: 08/28/2024

Status: PURCHASED

This action will generate a new copy of this form which will be emailed to you within the next 10 minutes. You can then review, edit you sure you want to continue? -

YES

Click the button below to generate your copy. You can then close this form.

Create Copy

6. Click on this link to access all the requests you have submitted:  
<https://docs.erp.ufl.edu/AppNet/docpop/docpop.aspx?clienttype=activex&cqid=287>

7. Select the PAR request that has a COPY status (see image below).

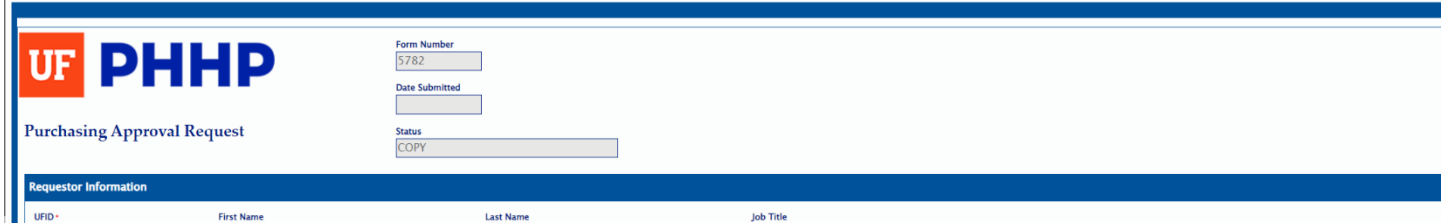
Custom Query Results

Drag a column header here to group by that column.

Date Submitted	Form#	Request Title	Status	Unit Requesting ...	Externally Funded?	Item Type	Item Vendor	Item Description	Item Quantity
	5782	TEST	COPY	COLLEGE	YES	GOOD/ITEM		TEST	1

Items: 5000; Results were limited, please refine your search.

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UF PHHP

Purchasing Approval Request

Form Number: 5782

Date Submitted: [ ]

Status: COPY

Requestor Information

UFID	First Name	Last Name	Job Title
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8. Update the request with the current purchase information.

9. Select Save for Later or Submit Now from the dropdown menu.

10. Click "Submit"

- a. You will receive an email confirmation with a link to your request.
- b. Once submitted, no changes can be made to the request unless revisions are requested. Attachments and comments may be added at any time to a request.

**Fiscal Contacts**

For questions related to the PHHP Purchasing Approval Request application, please contact:

Alexis Hampton  
 Phone: 352.294.8308  
 Email: alexishampton@phhp.ufl.edu

Amy Rankin  
 Phone: 352.273.6084  
 Email: akrankin@phhp.ufl.edu

For questions related to a specific Purchasing Approval Request, please contact the appropriate fiscal team member listed below:

Department Procurement	Contact	Email
Biostatistics	Ryan Jones	timothyjones@ufl.edu
Clinical and Health Psychology	Vincent Wiggins	vincent.wiggins@phhp.ufl.edu
College	Darnell Royal	droyal@phhp.ufl.edu
Environmental and Global Health	Erin Ferguson	erinferguson@ufl.edu
Epidemiology	Carrie Marshall	carrie.marshall@ufl.edu
Health Services Research, Management and Policy	Megan Kelly	megankelly@ufl.edu
Occupational Therapy	Anita Cottrell	ascottrell@ufl.edu
Physical Therapy	Amber Kelly	kelly.j@phhp.ufl.edu
Speech, Language, and Hearing Sciences	Eileen Phillips	eileen99@phhp.ufl.edu

External Research Procurement	Contact	Email
Departments of Biostatistics; Environmental and Global Health; Epidemiology; Health Services Research, Management and Policy; Occupational Therapy; and Speech, Language, and Hearing Sciences	Guiomar Sapi	guiomar.sapi@phhp.ufl.edu
Clinical and Health Psychology and Physical Therapy	Alexis Hampton	alexishampton@phhp.ufl.edu