**PRTM Purchasing Guide**

**\*All p-card purchases must be initiated by digitally submitting the appropriate business office form. All forms are located on the** [**PRTM Website**](https://www.clemson.edu/cbshs/departments/prtm/about/faculty-staff-resources.html) **under Business Forms and Documents. Please be sure that the forms are open in Adobe before completing and submitting. The preview on the web browser does not function correctly. If you have questions or issues regarding the forms, please contact Kristie Nieves (****knieves@clemson.edu****).**

**\*Please allow ample time for the purchase to be completed. We encourage you to submit the request with as much advance notice as possible.**

**\*If you are a shopper in BuyWays and can complete and submit a cart, a purchase request form will not be required. If you need assistance in creating a cart, please complete a purchase request form.**

***Supplies/Books/Memberships/Misc.***

1. Complete the [**Purchase Request and Reimbursement Form**](https://www.clemson.edu/cbshs/departments/prtm/_documents/prtm-non-travel-purchase-request-reimbursement-form.pdf). Attach quotes, screenshots, or any pertinent information as an attachment to the form. Digitally sign and click the orange “Click to Submit for Approvals” button. Press send on the email that is generated.
2. Once the form has completed workflow, an email will be sent to Kayla Lee (kbsloan@clemson.edu) so she can complete the purchase. You will be copied on this email, so you are aware approvals have been completed.

***Domestic Travel- Airfare/Registration Fees/Ground Travel***

[CU Travel Policy](http://www.clemson.edu/procurement/travel/)

[CBSHS Travel Policy](https://www.clemson.edu/cbshs/about/support-services/business-office/documents/cbshs-travel-policy-ada-5-9-19.pdf)

**\*Lodging, Mileage, and Meals will be reimbursed after the travel has been completed.**

1. Complete the [**Travel Request Form - Domestic**](https://www.clemson.edu/cbshs/departments/prtm/_documents/prtm-travel-request-form---domestic---2022.pdf), digitally sign, click the orange “Click to Submit for Approvals” button. Press send on the email that is generated.
2. Once the form has completed workflow, you will receive an email letting you know travel has been approved. If you would like to book your airfare or registration on the p-card, please contact Kayla Lee (kbsloan@clemson.edu) and provide the approved form.

***Foreign Travel- Airfare/Registration Fees/Ground Travel***

[CU Travel Policy](http://www.clemson.edu/procurement/travel/)

[CBSHS Travel Policy](https://www.clemson.edu/cbshs/about/support-services/business-office/documents/cbshs-travel-policy-ada-5-9-19.pdf)

**\*Lodging, Mileage, and Meals will be reimbursed after the travel has been completed.**

**\*Please allow additional time for approvals as there are multiple approvers in the process.**

1. Complete [**Travel Request Form - International**](https://www.clemson.edu/cbshs/departments/prtm/_documents/prtm-travel-request-form---international.pdf), digitally sign, click the orange “Submit” button. Press send on the email that is generated.
2. Once the form has completed workflow, you will receive an email letting you know travel has been approved. If you would like to book your airfare or registration on the p-card, please contact Annette Parker (annettp@clemson.edu) and provide the approved form.

***Software/Non-Hardware IT Solutions***

[CCIT Policy](https://ccit.clemson.edu/cybersecurity/policy/it-vendor-management/)

**\*Per CCIT Policy some IT Solutions require an assessment process PRIOR to purchase. Once submitted this assessment can take weeks to be approved. Please allow appropriate time for this to be completed.**

1. Complete the [**Purchase Request and Reimbursement Form**](https://www.clemson.edu/cbshs/departments/prtm/_documents/prtm-non-travel-purchase-request-reimbursement-form.pdf). Add quotes, screenshots, or any pertinent information as an attachment to the form. Digitally sign and click the orange “Click to Submit for Approvals” button. Press send on the email that is generated.
2. Once the form has completed workflow, an email will be sent to Kayla Lee (kbsloan@clemson.edu). You will be copied on this email, so you are aware approvals have been completed and if an IT assessment is required. If an IT assessment is not required, the purchase will be made by Kayla.
3. If required, you will be notified with instructions. Once the IT assessment is complete, please contact Kayla Lee (kbsloan@clemson.edu) with the approved IT assessment to complete the purchase.
4. The IT solution will need to be registered at <https://clemson.sharepoint.com/sites/ITR/SitePages/main.aspx> within 30 days.

***Incentive Cards/Gift Cards***

[Incentive Card Policy](https://www.clemson.edu/finance/business-manual/cts04proc.html)

**\*All Incentive Cards must be purchased via BuyWays from National Gift Card Company (NGC). Do not purchase cards from other sources. Reimbursement will not be provided.**

1. Complete the [**Incentive Card Statement of Responsibility Form**](http://media.clemson.edu/cfo/cash-treasury/Incentive-Card-Statement-of-Responsibility.pdf) and obtain IRB approval/exemption.
2. Complete the [**Purchase Request and Reimbursement Form**](https://www.clemson.edu/cbshs/departments/prtm/_documents/prtm-non-travel-purchase-request-reimbursement-form.pdf), attach Incentive Card Statement of Responsibility and IRB approval/exemption to the form, digitally sign, and click the orange “Click to Submit for Approvals” button. Press send on the email that is generated.
3. Once the form has completed workflow an email will be sent to Kayla Lee (kbsloan@clemson.edu) so she can complete the purchase. You will be copied on this email, so you are aware approvals have been completed.
4. As the cards are distributed complete the [**Incentive Card Distribution Log**](http://media.clemson.edu/cfo/cash-treasury/Incentive-Card-Distribution-Log.xlsx). Once complete, email the completed log to Annette Parker (annettp@clemson.edu).

***Food/Catering***

\*Please review the policy below. All prepared food being consumed on campus must come from Aramark or one of the [Approved Small Caterers](http://www.clemson.edu/procurement/faculty-staff/small-catering-engagements---campus-customer.html) .

[CU Food / Catering Policy](http://www.clemson.edu/procurement/how-to-buy-pay/goods-services/catering.html)

1. Complete the [**Purchase Request and Reimbursement Form**](https://www.clemson.edu/cbshs/departments/prtm/_documents/prtm-non-travel-purchase-request-reimbursement-form.pdf). Attach quotes, screenshots, or any pertinent information as an attachment to the form. Digitally sign and click the orange “Click to Submit for Approvals” button. Press send on the email that is generated.
2. Once the form has completed workflow an email will be sent to Kayla Lee (kbsloan@clemson.edu) so she can complete the purchase. You will be copied on this email, so you are aware approvals have been completed.