

## Procurement Assistance Form

**Purchase Type:**            Goods                            Services                            Other  
**Assistance Type:**        Purchase                            Reimbursement                Substantiation (PCard)

**Requester Name/Department:**

**Supplier Name:**

**Ship to Address:**

**Supplier Address:**

**If shipping off site "why":**

\*CFAO Approval Required

**Supplier Phone/Website:**

**Business Purpose:** Indicate if the purchase is for instruction and/or research. Include who, what, when, where, why. course number and/or research project name associated with the purchase. Provide justification when not using a preferred supplier i.e., emergency purchase, price savings, sole source, or research reliability & validity, etc.

**Product/Service Information:** Provide a quote. Need additional products/services attach additional sheets.

Qty	UOM	Product Description	Part #	Unit Price	Total
<b>Total:</b>					

**Account Numbers to Charge:**

GL Account Numbers						
Entity	Source	Org	Activity	Function	Amount	Rank

Grant Account Numbers					
Project	Task	Org	Award	Amount	Rank



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## Procurement Assistance Form Instructions

Use this form if you would like procurement assistance. Please ensure fund balances, correct accounts are used and proper approval if using an account other than your own, i.e., department operating, colleague RI, etc.

### Procurement Tools & Resources:

- a. Refer to the [OBI GL Funds Available](#) & [OBI Grants Funds Available](#) lookup tools or contact your Finance Contact to confirm account information.
- b. Refer to the Ohio University [Purchasing Guide](#), [Spending Guidelines](#), and [Bid Limit](#) requirements for your purchase.
- c. A purchase order is required before goods & services are purchased.
- d. Software requires OIT Approval & Finance Customer Care Contract approval before being purchased. Please see the [Technology Review process](#).
- e. For more information visit the [College of Arts & Sciences Procurement & Travel](#) information page.

### Submission Process:

- Complete the Procurement Assistance Form.
- Submit the completed Procurement Assistance Form to your Finance Contact. Include receipts, quote, account approval documentation, and any details needed to complete the request.
- The Finance Contact will send to CAS Procurement for processing.
- The Finance Contact will advise you when your request is complete.