

Completing the Confirming Order/Unauthorized Purchase Justification Form in PerfectForm format Introduced 7/26/18 to UC ANR UCCE Offices

The Unauthorized Purchase/Confirming Order form is available in the UC ANR Portal, left column, under the PerfectForms heading. Select Unauthorized Purchases; eventually there will be multiple types of forms available. Although the form is self-explanatory, tips are provided here.

The person completing the form, the originator, should be the individual that did not comply with policy. The form requires certification that steps have been taken to avoid the same situation from happening in the future, so it is required that the originator know what could have been done differently.

For a UC-employee or affiliate originator, the email address should be the originator's UC ANR email address.

If the originator is a volunteer, it is recommended that the Office Manager submit the forms as follows: *Volunteer _____ by Office Manager _____*. The Office Manager can then monitor the approval, and communicate with the volunteer. Other originators for a volunteer could be another UC employee or affiliate, but should be someone involved with the program, and would always be working with the volunteer during form submission.

Complete all fields as indicated, providing a full explanation of the reason for the confirming order, the business purpose, and what could have been done to avoid the confirming order.

Provide any relative attachments (e.g. invoice, p-card detail) that will help future approvers review the entire circumstance which necessitated the confirming order.

The originator selects the appropriate county from the drop down menu and the CD's name will populate. Upon submission, the CD will be notified of the pending form by email.

Upon accessing and reviewing the form via the link, the CD approves, adds comments as necessary, and selects the appropriate BOC (Kearney). The form electronically routes to Emily LaRue.

Once approved at the BOC, the form electronically routes to Jake McGuire, UC ANR Controller.

Once approved by the Controller's Office, it is electronically returned to the originator. The originator uses the approved and completed form to attach to the financial transaction (e.g. p-card detail, check request).

If there is disapproval at any point along the routing path, the form is returned to the originator.

Comments by the CD are helpful, either for approval or disapproval, to provide the BOC and the Controller's as much information as possible.

If you have questions, please contact Emily Melton Casado or Emily LaRue at the BOCK.