Smart Source Forms

Check Request Form
- These are done in Smart Source for non-confidential check payments:
  - Awards (For non-Drexel individuals); Honoraria; Employee Reimbursements (Non-Travel Related); Licenses; Memberships; Dues; Postage; Prizes; Non-Employee Reimbursements – including student reimbursements;
  - Non-standard invoices/order forms as with licensing agencies, conference sponsors, journal publishers, etc. and they do not accept a PCard.
  - Check requests that are of a confidential nature should be submitted on a paper check request form and emailed to smartsource@drexel.edu.

Confirming Order
- This form is used for after-the-fact purchases, when the end user already has an invoice in hand and there was no master agreement or contract
  - Emergencies are a legitimate reason.
  - Used in lieu of sole source since work already completed
- One invoice per confirming order
- The user must check the box to pay the vendor so that the system flips the Confirming Order to an invoice

Multi-Year Funding Source
- This form is used when placing an order where payments will span fiscal years or it is for a future fiscal year and the system is not yet open for dual year purchasing.
  - Users enter the amount due and payable against the current fiscal year. In the further description, the user describes the entire length of the order, dates, and amounts. E.G., 5 months @5.00 for FY 15 further description might read 7 months at $5.00 for FY16.
  - Where it is a multi-year contract, we add verbiage reminding the vendor that sometime early in our next FY, the subsequent years’ PO will be issued.

PO Change Order Request
- This form is used to make a change to an already existing purchase order
  - Changes to Cost, Quantity, Cost Center allocation or to cancel the purchase order can be made via this form. However, any amount that has already been invoiced, cannot be changed via this form. For the amount already invoiced that must be charged to a different cost center, process a transaction correction via General Accounting.
  - Please note: Catalog orders cannot be changed via this form. If/when a catalog order must be changed:
    - Pricing discrepancies – contact smartsource@drexel.edu
    - To reduce quantities: speak directly with suppliers
    - To increase quantities: simply place another order
    - To change accounting—process a transaction correction via General Accounting

Radiation Safety Form
- Non Perkin-Elmer radioactive materials can be ordered via this form which routes electronically to the Office of Radiation Safety.

Sole Source Justification Form
- This form actually creates the PO – no non-catalog or other form is used in Smart Source with a sole source form.
  - Over $5,000 up to $25,000 an informal bid process requires your best effort to obtain 3 bids; else use this form as appropriate.

Subaward
- Subaward forms are used when government grant funding is partially sub-contracted to another institution.