

## **Smart Source Forms**

### **Check Request Form**

- These are done in Smart Source for non-confidential check payments:
  - Awards (For non-Drexel individuals); Honoria; 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 [acctpay@drexel.edu](mailto:acctpay@drexel.edu).

### **Confirming Order**

- This form is used for after-the-fact purchases, when the end user already has an invoice in hand for goods and/or services already rendered and there is no purchase order.
  - Emergencies are a legitimate reason.
- One invoice per confirming order.

### **Multi-Year Funding Source**

- This form is used when placing an order where payments will span more than one fiscal year.
  - 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.

### **PO Change Order Request**

- This form is used to make a change to an already existing purchase order
  - Changes to Cost, Quantity, 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 journal entry 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 [sourcing@drexel.edu](mailto:sourcing@drexel.edu)
  - To reduce quantities: speak directly with suppliers
  - To increase quantities: simply place another order
  - To change accounting—process a journal entry 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 Safety and Health.

### **Sole Source Justification Form**

- This form is used for orders above \$5000 where multiple bids can not be obtained.
- Over \$5,000 up to \$25,000 an informal bid process requires you 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.