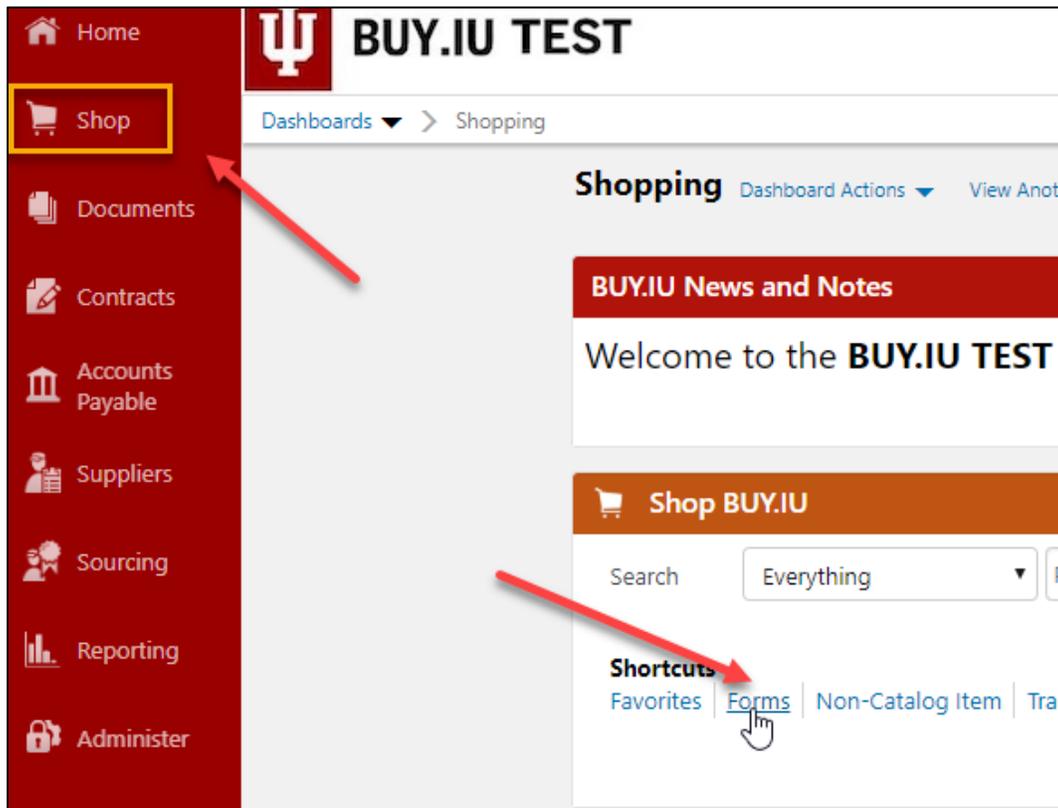




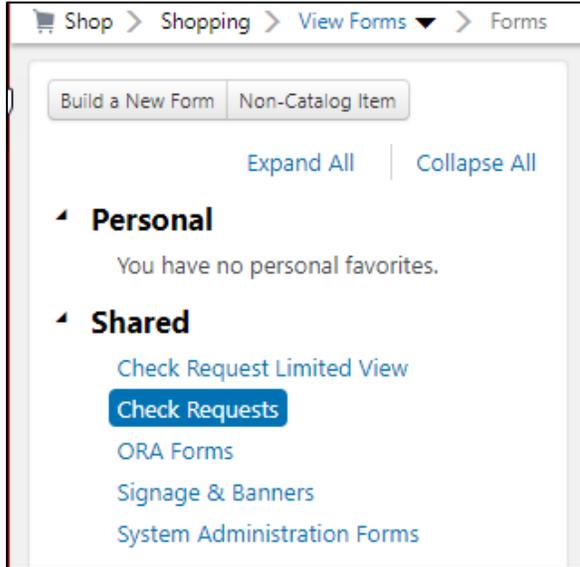
Prepaid Travel, Conference or Program Fees Payment

Sometimes a payment must be made to a supplier to prepay travel expenses. Examples of these payments include conference registration payments for suppliers that do not accept credit cards or a payment to a supplier for student group travel expenses. In these cases, you will want to include a payment to the supplier along with the Purchase Order. This is accomplished by completing a form in BUY.IU called 'Prepaid Travel, Conference or Program Fees Payment'.

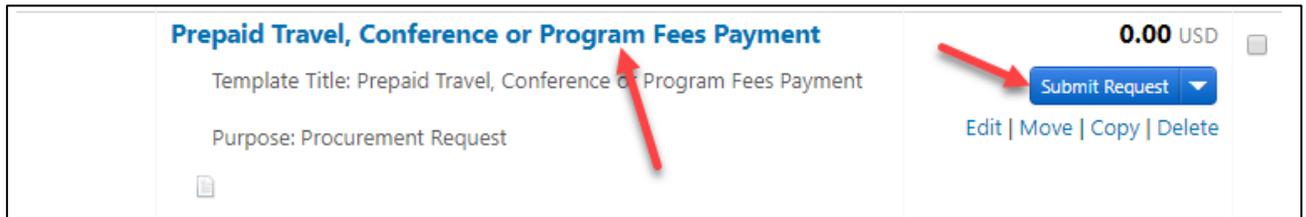
1. Go to 'Shop' at BUY.IU and select 'Forms'.



2. Be sure to select 'Check Requests'. Once selected, it will be highlighted in blue.



3. Select either the title link 'Prepaid Travel, Conference or Program Fees Payment' or 'Submit Report'.





- The following screen appears with instructions on the Object Codes that are appropriate for this Form. Click 'Next'.

Shop > Shopping > View Forms > Instructions

Back to View Forms

Prepaid Travel, Conferen...

Form Number **358537**
 Purpose **Procurement Request**
 Status **Incomplete**

Instructions

Suppliers ✓
 Form Fields ✓
 Prepaid Travel, Conferenc... ✓
 Substantiation Document... ✓
 Review and Submit

Instructions Request Actions | History | ?

This Check Request form should be filled out for:

- Payment for prepaid travel
- Conference registration
- Program fees
- Insurance
- Used for any prepaid travel to include conference registration, lodging, limousine and air fares. It can be used to prepay expenses for employees or non-employees.

For Prepaid Travel, Conference, or Program Fees Payment, you should only use the following object code(s) on the resulting requisition:
 4088 / 4089 / 6000 / 6100 / 6200 / 6060 / 6160 / 6260 / 6070 / 6170 / 6270

Next >

- Enter a supplier name (or partial name) and then click 'Search'. If the Search Registered Supplier produced no results, you can select 'Manually Add Suppliers'. Contact the Supplier Workgroup at supplier@iu.edu for assistance with manually adding suppliers.

Shop > Shopping > View Forms > Suppliers

Back to View Forms

Prepaid Travel, Conferen...

Form Number **358574**
 Purpose **Procurement Request**
 Status **Incomplete**

Suppliers Request Actions | History | ?

Supplier Please select a fulfillment center below.

Manually Add Suppliers

Search Registered Suppliers

Supplier
 Relationship
 Zip Code Within

Clear Search



6. 'Select' the correct Supplier.

Shop > Shopping > View Forms > Suppliers Logout

[Back to View Forms](#)

Prepaid Travel, Conferen...

Form Number **358574**
Purpose **Procurement Request**
Status **Incomplete**

Instructions

Suppliers ✓

Form Fields ✓

Prepaid Travel, Conferenc... ✓

Substantiation Document... ✓

Review and Submit

Suppliers Request Actions | History | ?

Supplier Please select a fulfillment center below.

[Manually Add Suppliers](#)

[Modify Search](#)

| Supplier Name | Doing Business As | Fulfillment Centers | Action |
|--|-------------------|---|---------------------------------------|
| AAMC-Meetings | | AAMC-Meetings: (preferred) P.O. Box 419712, None, None, Boston, MA 02241-9712 US | <input type="button" value="Select"/> |
| Association of American Medical Colleges | | Washington, DC: (preferred) AAMC Publications, 2450 N Street, NW, None, Washington, DC 20037 US | <input type="button" value="Select"/> |

7. You will notice the Supplier name and address is populated at the top and the 'Selected' indicator checkmark is now green. Click 'Next' to proceed.

Suppliers Request Actions | History | ?

Supplier AAMC-Meetings
AAMC-Meetings: P.O. Box 419712, None, None, Boston, MA 02241-9712 US

[Manually Add Suppliers](#)

[Modify Search](#)

| Supplier Name | Doing Business As | Fulfillment Centers | Action |
|--|-------------------|---|--|
| AAMC-Meetings | | AAMC-Meetings: (preferred) P.O. Box 419712, None, None, Boston, MA 02241-9712 US | <input checked="" type="button" value="Selected"/> |
| Association of American Medical Colleges | | Washington, DC: (preferred) AAMC Publications, 2450 N Street, NW, None, Washington, DC 20037 US | <input type="button" value="Select"/> |

[Previous](#) [Next](#)

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- 8. You will notice that the Progress for both Form Fields is incomplete. Either select the field name or 'Next' to complete the process. You will need to do this for both fields.

- 9. Enter all of the required fields (*) and the Amount. Click 'Next' to continue or 'Save Progress' to complete at a later time.

| Unit Price | Quantity | Total |
|------------|----------|----------|
| 1000 USD | 1 | 0.00 USD |



The next screen is asking for Substantiation Documentation. Pay attention to the 'Instructions' which describes critical data. If you select 'yes' you will be taken to a screen where you can upload your file. Note that supporting documentation (such as a conference registration form or supplier invoice) is always required for travel payments in order to substantiate the payment request.

11.10. Select 'yes' and then 'Upload'.



12.11. Enter a Title and then select 'Choose File'.

Upload

Title * Conference Information

File * Choose File No file chosen
Maximum upload file size: 25.0 MB

* Required Save Changes Close

13.12. Select the correct file....either double click or click 'open' and the file will upload to the form.

| | Name | Date modified | Type | Size |
|------------|--|--------------------|---------------------|------|
| OneDrive | | | | |
| This PC | | | | |
| 3D Objects | | | | |
| Desktop | | | | |
| Documents | | | | |
| | AACM Conference.docx | 5/15/2019 1:50 PM | Microsoft Word D... | 12 |
| | The Dashboard in BUY.IU.docx | 5/15/2019 11:53 AM | Microsoft Word D... | 636 |
| | Prepaid Travel, Conference or Program F... | 5/15/2019 11:48 AM | Microsoft Word D... | 439 |
| | How to Complete a Check Request.docx | 5/13/2019 5:17 PM | Microsoft Word D... | 53 |

14.13. Click 'Save Changes'

Upload

Title * Conference Information

File * Choose File AACM Conference.docx
Maximum upload file size: 25.0 MB

* Required Save Changes Close



15.14. The file has now uploaded. The title that you chose for your file (Conference information) will display noting that your upload was successful. Click 'Next'.

Substantiation Documentation Upload

Documentation that provides key travel, conference, or program details. Examples would be dates, locations, event name, etc.

Please upload the required substantiation documentation. Examples include dates, locations, event name, etc. *

Conference Information
Upload

Optional, additional substantiation documentation

No File Attached
Upload

Optional, additional substantiation documentation

No File Attached
Upload

< Previous Save Progress Next >

NOTE: If you had clicked no, you will need to note where the information will be stored rather

Form Fields - Substantiation Documentation Request Actions | History | ?

★ Response Is Required

Instructions
A note on critical data : Critical data (SSN, card numbers, home address, etc.) in attachments must be redacted prior to uploading. Information on properly redacting sensitive data is available [here](#). If documentation is better stored securely in a local location, justification is required below.

Substantiation Documentation

Is the substantiating documentation applicable for uploading? *

Yes No

Local Storage of Documentation

Document location (building and room number): *

2000 characters remaining

Reason for Document Location = Initiation Organization: *

HIPPA
 FERPA
 Confidentiality
 Other (Explain below)



than uploaded.

16.15. The last thing to do before you are able to add the order to your cart is to select 'Review and Submit'. **The system will not allow you to submit without this last step!**

[Back to View Forms](#)

Prepaid Travel, Conferen... **Review and Submit**

Form Number **358574**
 Purpose **Procurement Request**
 Status **Incomplete**

| Section | Progress |
|-----------------------------|----------------------------|
| Suppliers | ✓ Required Fields Complete |
| Form Fields | ✓ Required Fields Complete |

Instructions
 Suppliers ✓
 Form Fields ✓
 Prepaid Travel, Conferenc... ✓
 Substantiation Document... ✓

Review and Submit

17.16. You are now ready to 'Add and go to Cart'.

Prepaid Travel, Conferen... **Review and Submit** Request Actions | History ?

Form Number **358574**
 Purpose **Procurement Request**
 Status **Incomplete**

| Section | Progress |
|-----------------------------|----------------------------|
| Suppliers | ✓ Required Fields Complete |
| Form Fields | ✓ Required Fields Complete |

Instructions
 Suppliers ✓
 Form Fields ✓
 Prepaid Travel, Conferenc... ✓
 Substantiation Document... ✓

Review and Submit

[Previous](#) [Add to Favorites](#) [Add and go to Cart](#)



18.17. There is one more alert that needs fixing. In this case, there is an invalid Commodity Code. Click the looking glass.

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Invalid value: Commodity Code (Line 1)

1 Item(s) for a total of **1,000.00** USD

Shopping Cart for Donna Burkhardt

[Save](#) [Proceed to Checkout](#) or [Assign Cart](#)

Cart Name: 2019-05-15 0001823773 02
 Description/Business Purpose: [Empty]

Supplier / Line Item Details

Hide line details For selected line items [Add to Favorites](#) [Go](#)

AAMC-Meetings [more info...](#)
 AAMC-Meetings
 P.O. Box 419712, None, None, Boston, MA 02241-9712 US

[Add discount for this supplier...](#)

| Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price |
|---|------------|------------------|------------|----------|---------------------|
| Prepaid Travel, Conference or Program Fees Payment more info... | | | | | |
| 1 Amount Procurement Request: Prepaid Travel, Conference or Program Fees Payment | | | 1,000.00 | 1 | 1,000.00 USD |
| Commodity Code: Specialized educational s  | | | | | |
| Capital Asset? <input type="checkbox"/> | | | | | |
| Supplier subtotal | | | | | 1,000.00 USD |
| Subtotal | | | | | 1,000.00 |
| Total | | | | | 1,000.00 USD |

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

19.18. This will take you to the Commodity Code Search where you can enter key words in the Description field. Then click 'Search' to display the results.

Commodity Code Search

Code starts with... [Input Field]

Description contains... Education [Input Field]

[Search](#)



20.19. 'Select' the correct code.

| Code | Description | |
|------|--|------------------------|
| IT12 | Educational Training & Certifications: Employees (Technology) - Online & Paper | select |
| SCI7 | Educational Testing & Certifications: Students - Online & Paper | select |
| SCI8 | Educational Training & Certifications: Employees (Non-Technology) - Online & Paper | select |

21.20. The code is populated and now you can 'Proceed to Checkout'.

| Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price |
|--|---------------|---|-----------------|-----------------------------|---------------------|
| Prepaid Travel, Conference or Program Fees Payment more info... | | | | | |
| Select price or contract... | | | | | |
| 1 | Amount | | 1,000.00 | 1 | 1,000.00 USD |
| Procurement Request: Prepaid Travel, Conference or Program Fees Payment | | | | | |
| Commodity Code | | <input type="text" value="SCI8"/> Educational Training & Certifications: Employees (Non-Technology) - Online & Paper | Internal Note | add note... | |
| Capital Asset? | | <input type="checkbox"/> | External Note | add note... | |
| Supplier subtotal | | | | | 1,000.00 USD |
| Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals. | | | | | |
| Subtotal | | | | | 1,000.00 |
| Total | | | | | 1,000.00 USD |
| <input type="button" value="Save"/> <input type="button" value="Proceed to Checkout"/> or <input type="button" value="Assign Cart"/> | | | | | |



22-21. Almost ready to go! The Object code must be entered. Click 'Required Field'. Refer to Step 3 to view the list of object codes associated with this form. Select the correct one from that list

Shop > My Carts and Orders > Open My Active Shopping Cart > Accounting Codes - 2660342 - Draft Requisition

Almost ready to go! The list below needs to be addressed before the request can be submitted.
 • Required field: Obj Code

Requisition: 2660342
 2019-05-15 0001823773 02

Status: Draft
 Document Total: 1,000.00 USD
 What's next for my order?

Accounting Codes

| Fiscal Year | Account SubAccount | Obj Code | Project Code | Org Ref Id |
|-------------|--|-----------------------------------|--------------|------------|
| 2019 | 1915030 PURCHASING DEPARTMENT (1915030 UA-PUR) | no value Required field | no value | no value |

Lines

AAMC-Meetings
 more info...
 AAMC-Meetings
 P.O. Box 419712, None, None, Boston, MA 02241-9712 US

| Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price |
|--|------------|------------------|------------|----------|--------------|
| 1 Amount Procurement Request: Prepaid Travel, Conference or Program Fees Payment | | | 1,000.00 | 1 | 1,000.00 USD |

Accounting Codes (same as header)

23-22. Refer to Step 4 to view the list of object codes associated with this form. Select the correct one from that list and click 'save'.

Accounting Codes

Select from your code favorites

| Fiscal Year | Account SubAccount | Obj Code | Project Code | Org Ref Id |
|-------------|--------------------|----------|--------------|------------|
| 2019 | 1915030 | 6100 | | |

Select from profile values... Select from all values...
 Select from profile values... Select from all values...
 Select from all values... Select from all values...

Save Cancel



24.23. You are now ready to click 'Final Review', which is required prior to placing the order.

< Return to shopping cart

This order is ready to be placed. Place Order Assign Cart

Requisition: 2660342
2019-05-15 0001823773 02

Status: **Draft**
Document Total: **1,000.00 USD**
What's next for my order?

Requisition

- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachm...
- External Notes and Attachm...
- Integration
- Special Payment Instructions
- Recurring Payments
- Tax Information
- Final Review

Accounting Codes Document Actions History ?

| Fiscal Year | Account SubAccount | Obj Code | Project Code | Org Ref Id |
|-------------|--|---|--------------|------------|
| 2019 | 1915030 PURCHASING DEPARTMENT (1915030 UA-PUR) | 6100 EMPLOYEE OUT OF STATE TRAVEL | no value | no value |

Lines Selected Line Item Actions

AAMC-Meetings
[more info...](#)
AAMC-Meetings
P.O. Box 419712, None, None, Boston, MA 02241-9712 US

| Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price |
|--|------------|------------------|------------|----------|--------------|
| Prepaid Travel, Conference or Program Fees Payment more info... | | | | | |
| 1 Amount Procurement Request: Prepaid Travel, Conference or Program Fees Payment | | | 1,000.00 | 1 | 1,000.00 USD |

Accounting Codes (same as header) edit

25.24. After a thorough review, click 'Place Order'. Remember to click 'Review and Submit' even though it may be green. The system will not allow you to place order until this step is completed.

< Return to shopping cart

This order is ready to be placed. Place Order Assign Cart

Requisition: 2660342
2019-05-15 0001823773 02

Status: **Draft**
Document Total: **1,000.00 USD**
What's next for my order?

Requisition

- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachm...
- External Notes and Attachm...
- Integration
- Special Payment Instructions
- Recurring Payments

Final Review Document Actions History ?

Expand All Collapse All

General edit

Cart Name: 2019-05-15 0001823773 02
 Description/Business Purpose: no value
 Prepared by: Donna Burkhardt
 Prepared for: Donna Burkhardt
 PO Clauses: 1 Contractor edit clauses...
 Owner Phone: +1 812-855-7226
 Order Restricted?: **x** view all clauses - (1)

Shipping

Billing



Your Requisition has now submitted. You can select any of the Steps in the green box.

Requisition Submitted

Next Steps
 You can view or print this at: [Requisition 2660342](#), or via the [Document Search](#) page

- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

| | |
|----------------------|------------------------------------|
| Requisition number | 2660342 Quick View |
| Requisition status | Pending |
| Cart name | 2019-05-15 0001823773 02 |
| Requisition date | 5/15/2019 |
| Requisition total | 1,000.00 USD |
| Number of line items | 1 |

~~26-25.~~ Once the REQ has gone through workflow, you can search for it and click 'View Related Documents' to view the Purchase Order and the Invoice.



Requisition: 2660342
2019-05-15 0001823773 02

Status: **Completed**
Document Total: **1,000.00 USD**
[View Related Documents](#)

[Requisition](#) >

PR Approvals

Comments

Attachment Overview

Purchase Order: PO0003143 [View](#) [Print](#)

Invoice: SI0001272 [View](#) [Print](#)

[View Related Documents](#)

[Requisition](#) >

We suggest, rather than printing the PO, you can save it as a pdf or other document type to be stored in a secured location. Select 'Print'.

Documents > Document Search > Search Documents >

Purchase Order: PO0003143 [View](#) [Print](#)

Invoice: SI0001272 [View](#) [Print](#)

[View Related Documents](#)

[Requisition](#) >

Summary

General

Status

Submitted

Right click your mouse on the Summary page. Select either 'Save as' or 'Adobe Acrobat'.



Summary - PO PO0003143

PO/Reference No. PO0003143
Supplier AAMC-Meetings

| General Information | Shipping Information | Billing/Payment |
|--|--|---|
| PO/Reference No. PO0003143 Revision No. 1 Supplier Name AAMC-Meetings Address P.O. Box 419712 None None Boston, MA 02241-9712 US Phone +1 000-000-0000 Order Restricted? x Supplier Fax +1 000-000- | Ship To 507-509 E 7th St Bloomington, IN 47408-3865 United States ShipTo Address Code BL021B | Bill To Contact Line 1 AP Billing 1000 Waterway Blvd Suite 101 Indianapolis, Indiana 46202 United States Billing Options Payment Terms 0, Net 30 F.O.B. N/A |

Setup Internal Notes and Attachm... External Notes and Attachm... Integration Special Payment Instructions

- Back Alt+Left Arrow
- Forward Alt+Right Arrow
- Reload Ctrl+R
- Save as... Ctrl+S
- Print... Ctrl+P
- Cast...
- Translate to English
- Adobe Acrobat
- View page source Ctrl+U
- Inspect Ctrl+Shift+I

This is the Purchase Order (note: only a partial screen shot).



Documents > Document Search > Search Documents > Status - PO PO0003143 Logout

Purchase Order:
PO0003143 Revision 1
2905139

Supplier: AAMC-Meetings
Status: Completed
Document Total: 1,000.00 USD
[View Related Documents](#)

Status

Purchase Order >

Revisions

PO Approvals

Shipments

Change Requests

Receipts

Invoices 1

Comments

Attachment Overview

Status Document Actions | His

[Expand All](#)

General Information

| | |
|---------------------|--|
| PO/Reference No. | PO0003143 |
| Revision No. | 1 |
| Supplier Name | AAMC-Meetings more info... |
| Purchase Order Date | 5/15/2019 |
| Total | 1,000.00 |
| Owner Name | Donna Burkhardt |
| Owner Phone | +1 812-855-7226 |
| Owner Email | djburkha@iu.edu |
| Requisition Number | 2660342 view print |

Document Status

| | |
|--------------|---|
| A/P status | Open |
| Workflow | ✓ Completed (5/15/2019 2:28 PM) |
| Distribution | The system will distribute purchase orders using the method(s) indicated below: Manual (choose this if email is unknown) |
| Supplier | New Order |
| Receiving | none |
| Invoicing | Fully Invoiced |
| Matching | No Matches |

Lines

| Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price | Supplier | Receiving | Invoicing |
|---|------------|------------------|------------|----------|--------------|----------|-----------|-----------|
| Prepaid Travel, Conference or Program Fees Payment more info... | | | | | | | | |
| 1 Amount | | | 1,000.00 | 1 | 1,000.00 USD | New | none | Fully |

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Please let us know if you have questions. You can write: askbuyiu@iu.edu.