

GUIDELINES & PROCEDURES

PROFESSIONAL DEVELOPMENT SCHOLARSHIP/AWARD EXPENSES

(Includes Ambassadors, Margaret Fitch, Marilyn Burns, Lucille Clark, Lois DeMond, Irma Manning, Grace Spivey)

Purchases for professional development scholarships or awards can be made by using the following forms of payment: 1) Cash; 2) P-Card; 3) Check; 4) Direct Pay. Some necessary information you will need to know and the procedures to follow are included below:

CASH: You will need a paid itemized receipt showing cash as the form of payment. When you send this information to me (**contact information below**), please include the name of the project, name of the person to be reimbursed and their complete address.

P-CARD: You **MUST** get pre-approval before the purchase is made by completing a "Purchase Request form." A copy of the form is attached for your convenience. Please contact me at anytime if you are in need of another form or have questions. The following procedure should be followed for p-card purchases:

- 1) **Before Purchase** - Complete Purchase Request form and submit to me via email kimberly.nolting@okstate.edu. I will assign a PO number, account number to be charged, and secure approval from this office. The form will then be returned to you via email. Please keep in mind that you will need to secure the approval of your purchase approver as well. You are now ready to make the requested purchase(s).
- 2) **After Purchase** – Please email or FAX (405-744-5506) a copy of your itemized purchase receipt/invoice, as well as a copy of the approved Purchase Request. This should be done on the day of purchase if at all possible. Of course, you will need to follow specific directions as assigned for your p-card transaction(s).

P-card purchases are encouraged whenever possible as it is the fastest way to pay a vendor for service.

CHECK: Purchases can be made with a check. In order to be reimbursed, you will need to provide 1) paid itemized invoice; and 2) copy of cancelled check or bank statement showing payment of that particular check. If a bank statement is submitted, please blackout all other personal information except the needed items.

DIRECT PAY: Please follow these steps:

- 1) **Before Purchase** – Please make sure that the vendor agrees to invoice us directly. However, you **MUST** get pre-approval before the actual purchase is made by completing a "Purchase Request form." I will assign a PO number, account number, and secure approval. The form will then be returned to you via email. Please contact me at anytime if you are in need of a form or have questions.
- 2) **After Purchase** – It would be best to ask the vendor to bill this office directly. However, if it is sent to you, please send the original invoice to me as soon as possible. It is extremely important to pay our vendors in a timely manner.

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