

Approval Queues Policy

As Banner approaches, we have decided to establish policy concerning purchasing goods and/or services on any account that is monitored by the Physics and Astronomy Department.

Background:

The Banner purchasing process consists of three distinctive levels:

| <u>Level</u> | <u>Description</u> |
|--------------|--|
| Requestor | Individual who requests purchase and has it approved (could be the Same person) |
| Initiator | Individual who enters the approved requestor's information in the Banner system |
| Approver | Individual who approves the initiator's work and electronically sends to appropriate Central Administrative Unit |

Policy

As of July 1, 2004 a requestor's request to purchase or be refunded for a purchase - as in the case of Direct Pay (formerly known as Check Request) or Petty Cash – must be approved by the individual responsible for the account from which the purchase is being made. This can be done one of two ways:

1. Complete the "Request" form, pertinent to your type of purchase/reimbursement, which will be found on the PandA website under the new heading/link "Business Forms". (Site will be up and ready June 30, 2004). Attach the "Request" form to an email. Email this form to the individual responsible for the account. The responsible individual will then forward to the Main Office if the request is approved. The email must come from the person responsible for the account for the request to be initiated in the Banner System.
2. Same as #1, except print the form, have it signed by the person responsible for the account and return to Main Office.

All purchases must comply with all UNM policy and procedures. This policy begins on July 1, 2004. It will be reviewed and may be amended on September 1, 2004.