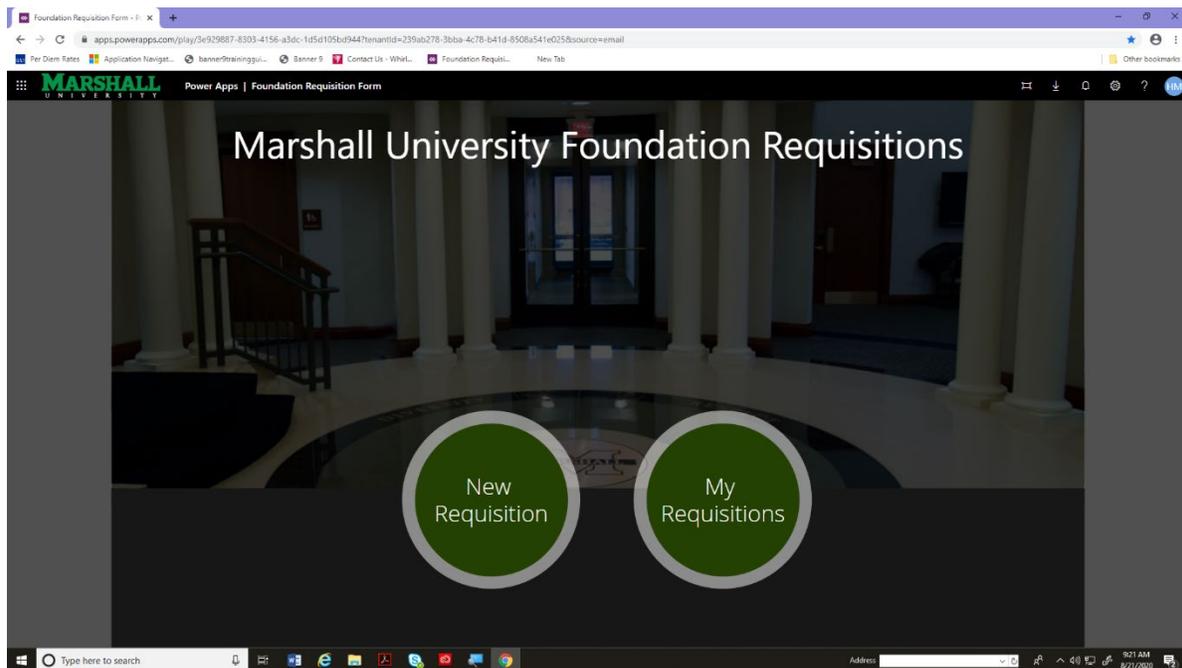# New Foundation Requisition Form Application

You can find the link to the new app on the Foundation website under the finance tab or on the MyMU employee page. The direct link to the application is https://apps.powerapps.com/play/3e929887-8303-4156-a3dc-1d5d105bd944?tenantId=239ab278-3bba-4c78-b41d-8508a541e025

Click on New Requisition Button and you will be taken to the Foundation Requisition form (see next page).

Fields to Enter:

Payee name-The name of the Individual or Company to be paid IS required.

901 number-If this is payment to a student or MU Staff, please provide their assigned 901# if available.

Created by-This field is automatically generated and will be the person logged in creating the requisition.

First approver- You MUST include the email address of the first person who needs to approve the requisition. This could be the person being reimbursed, a faculty member, the Dean/fund manager, etc. Click on the arrow and then begin typing the name (last, first) or email address and a list of choices will appear. Then, click on the appropriate choice.

Street Address, City and Zip-A complete address IS required.

Fund number/Fund name-A valid six-digit fund number and complete fund name ARE required.

Vendor Invoice/Quote#-Enter the number located on the vendor's invoice for direct payments or the relevant quote number for Purchase Orders. Please note, you can no longer include multiple invoices on one requisition as done previously on the paper form. In the new application, a separate requisition must be completed for each invoice.

Pickup Person Name/Contact Information-If you wish to pick up the check, please fill in the name and contact information for the person to be notified. You can also indicate "Campus Mail" in the contact info section if you wish the check to be sent to the person/department indicated in the pickup box.

**Detailed Justification Statement:**

You MUST provide a detailed justification statement that includes details such as who, what, when, why, and where. This statement needs to explain how the expense benefits your program and/or adheres to the fund guidelines.

Attachment Box:

Please attach required back up documentation by clicking on the "Attach file" icon. This could include invoices, quotes, independent contract agreements, W-9 forms, travel settlement forms, receipts, or email correspondence that supports the expenditure.

Payment/Order Detail Box:

You need to provide the itemized details of what you are paying for or ordering.
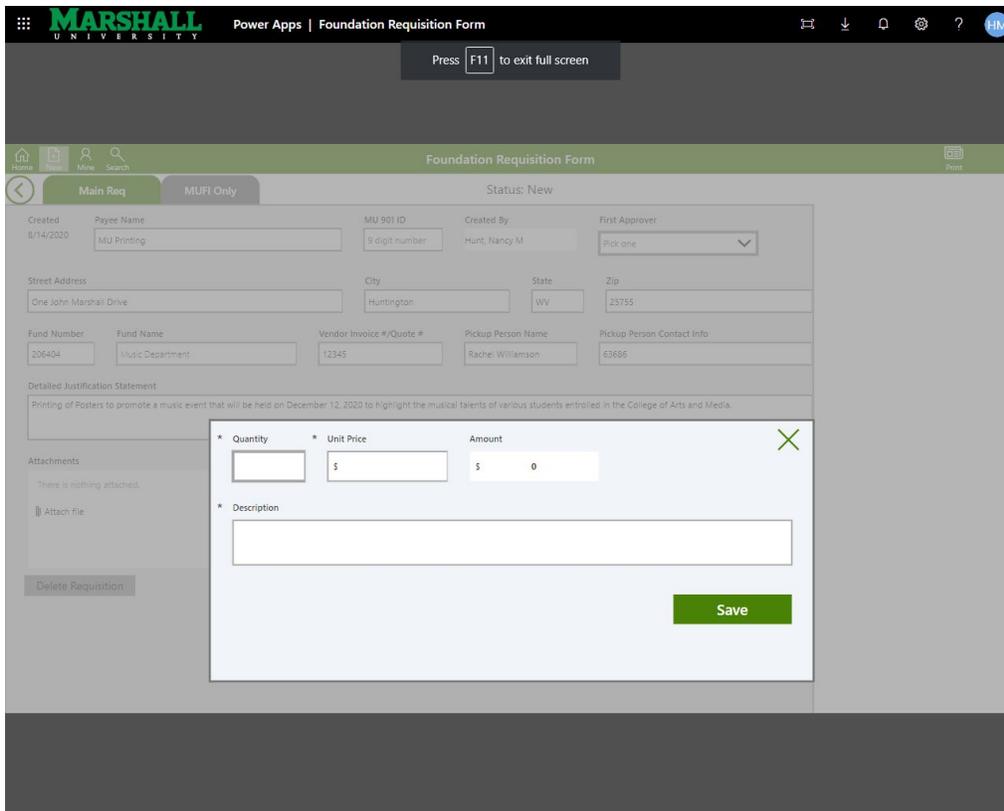
Click on the Add Row button, and it will open the box above. Enter the quantity, unit price and description of each item. Click Save.

If more than one item/order is included on the requisition, you can repeat the previous procedure to add as many rows as necessary.

If for some reason you do not wish to submit the requisition for processing right away, choose Save Draft, and you will be able to come back to it at a later time.

When the requisition is complete and ready to be processed, simply click Submit, and it will be routed/emailed to the person you chose as the first approver.

My requests:

In order to complete a saved requisition, click on the My Requests tab.

This tab lists all requisitons created by the user, including saved and submitted documents. The date of creation and status is included for each item. (See the box below.) Simply scroll up or down the list and click on any item to open the requisition. Continue creating the requisition by adding additional information or making any changes. Click the Save tab and then Submit.

The Foundation is not made aware of any requisitions until they are submitted for processing. Therefore, we cannot track or be responsible for requisitions that are stalled in the approval process.

You can review the progress of requisitions you have created by selecting the item under the My Requests tab as noted above. The status is displayed on the top of the document while the chain of approvals is detailed in the approval pane on the right hand side of the document. The creater of the requisition can identify the approval awaiting or where the request is in the finance process at the Foundation. This will allow the preparer to monitor the flow of the requisition.

Foundation Requisition Form - Fc ×   +

apps.powerapps.com/play/3e929887-8303-4156-a3dc-1d5d105bd944?tenantId=239ab278-3bba-4c78-b41d-8508a541e025&source=email

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Power Apps | Foundation Requisition Form

Foundation Requisition Form

Print

Home   New   Mine

Main Req

Status: Submitted

Eastham, Donna

Awaiting approval

Created	Payee Name	MU 901 ID	Created By
8/24/2020	Chapman Printing	9 digit number	Hunt, Nancy M

Street Address	City	State	Zip
2450 1st Avenue	Huntington	WV	25703

Fund Number	Fund Name	Vendor Invoice #/Quote #	Pickup Person Name	Pickup Person Contact Info
150001	MUF-General	0708123		

Detailed Justification Statement

Printing of envelopes and checks to be used for Accounts payable function of paying bills and mailing out checks and also mailing out gift receipts to donors.

Attachments

There is nothing attached.

Account	Description	Qty	Unit Price	Amount	Invoice
⚙	Printing of 5500 Laser Checks	1	$689.98	$689.98	
⚙	Printing of 7,500 #10 Window Envelopes	1	$445.50	$445.50	

Total: $1,135.48

Type here to search

Address

4:05 PM
8/24/2020

Approving a Requisition:

The approver will receive an **email from Foundation Workflow** similar to the one shown below.

The approver simply needs to click on the provided link to open the requisition in the application. Requisitions awaiting the user's approval can also be accessed in the application under the "Requisitions Awaiting my Approval" tab.

The approver needs to review the requisition for accuracy as well as compliance with the fund guidelines/purpose. If changes need to be made to the requisition, it can be rejected and routed back to whomever needs to make the corrections or click the Edit button located at the top right-hand side of the requisition. This function allows the user to add data or change any existing data on the requisition. Once any changes are made, the Save Changes button must be clicked before the requisition can be approved or rejected.

If rejected, the user must choose to whom the requisition should be routed. Simply begin typing the email address or name (last, first) and a list of available options will appear. Click on the appropriate option. A note or explanation can also be added in the comment box provided, but it is not required.

If the user agrees with the expenditure and related documentation, click the Approve button. If a second approval is needed, choose To Another Individual when asked where to route to. Begin typing the email address or name (last, first) and a list of possible options will appear. If no additional approvals are needed, click To Finance Dept. MU Foundation Finance staff will receive an email that a requisition has been sent for processing. **PLEASE NOTE: Do not route this directly to MUF staff.**

Deleting a Requisition:

A delete function is built into the application. If it is decided that a requisition no longer needs to be processed, click the Edit button located at the top right-hand side of the requisition. On the left-hand side of the form, below the attachment box, there will be a shaded box that says Delete Requisition. Click on it. A red box will pop up to verify the action is wanted. Click the verification, and the requisition will be deleted. Once deleted, the requisition cannot be retrieved. Once the Requisition has been submitted to the Foundation, it can no longer be deleted. You must then contact MUF fiancé to request the deletion.

MUFI Actions:

The policies and procedures for processing a requisition at the Foundation have not changed other than reviewing and working from an electronic document rather than a paper form. Accounts Payable will review the requisition for accuracy, proper

approvals, and documentation. If items are missing or inaccurate, the requisition will be rejected and sent back electronically.

Some of the more common reasons requisitions are **rejected** include:

- Department/Dean Approval missing
- Inadequate documentation or no documentation attached
- Justification Statement is lacking
- Found to be a duplicate requisition
- Expenditure does not conform to the fund guidelines
- W-9 Form missing for those who are new vendors
- Not approved by the person seeking reimbursement.