THE RESEARCH FOUNDATION
The State University of New York

What to Have Ready to Prepare E-forms

For ease in preparing an E-from, gather together the items of information and documents before beginning to complete an E-form.

<u>Have ready</u>:

- ✓ The project, task and award(s) that will be charged.

- ✓ The project abstract/budget – to allocate charges to correct category permitted by the project/sponsor.

- ✓ Scanned supporting documents (i.e.quotes, invoices, W-9's). Have available the file directory (or jump drive) where the scanned documents are stored.
  (NOTE: All E-forms require documentation to be attached)

- ✓ The legal name, address and contact information of the vendor / individual.

- ✓ The email address of the PI who will authorize the expenditure.

- ✓ The RF website, E-forms page open to select the appropriate e-form to complete. The link is http://www.rf.buffalostate.edu/forms/forms-purchasing.html.