



What to Have Ready to Prepare E-forms

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

Have ready:

- ✓ 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 <https://sponsoredprograms.buffalostate.edu/procurement-forms>