**Important Links**

- Centresuite
- eThority
- ePayment
- eTravel
- myGrant
- myUHportal
- online Pay Statements
- SuperQuote
- UH KFS Portal
- UH OPRPM PCard

**UH Maui College Sites**

- Admissions and Records
- Campus Directory
- Email Request
- Faculty & Staff
- Financial Aid
- Human Resources
- Information Technology (IT)
- Key Request Process
- Operations & Maintenance
- Room Schedule R25
- Security
- Student Affairs
- Transcript Request
- Tuition Refund Policy

**University of Hawai’i Sites**

- Administrative Procedures
- EEO/AA Directors and Coordinators
- EThority - reporting tool for Kuali to find out balances, expenditures, etc. on your accounts
- eTravel
- eTravel Training Schedule
- Financial Management Office (FMO)
- Hawaii Compliance Express
- Institutional Research and Analysis Office
- Kuali Financial Systems (KFS) UH Portal - Firefox, Safari and Chrome are recommended browsers
- Kuali Financial Systems (KFS) Training Site
- Object Codes
- Office of Research Services (ORS) - extramural funds/grants
- PCard Site
- Price Lists - SPO
  - Price/Vendor Lists
- Procurement - General Principles
- Research Corporation of the University of Hawai`i (RCUH) - includes forms
- SECE - Pay Periods (and payroll deadlines) for student employees

**Outside Links & Resources**

- Commerce Point (Superquote)
- SuperQuote (Commerce Point)
University of Hawai‘i Sites (continued)

- State Vehicles
- SuperQuote
- System Office of Human Resources
- Time Sheet and Payroll (TAP) System (Casual Hire) - deadlines and forms
- Time Sheet Pay Stubs
- UHCC Annual Report of Program Data
- UHCC Office of Vice President
- UH Computer Virus and Threat Information
- UH Foundation
- UH System Directory
- UH System-wide Policies and Procedures
- UH OPRPM PCard The University of Hawaii Office of Procurement and Real Property Management (OPRPM) Purchasing Card site
- Work at UH

Travel

- DISB-4 - Employee Travel Form (manual for non-employees)
- DISB-4B - Multiple Destination/Multiple Rate Worksheet
- DISB-4C - Per Diem/M&IE/Lodging Tax Calculation Worksheet
- DISB-4D - Receipt Summary Worksheet
- DISB-4E - Excess Commercial Lodging Expense Certification Form
- DISB-33 - Personal Automobile Mileage Voucher

Resources

- eTtravel FAQ Storyboard
- eTravel site for individuals in PeopleSoft.
- Profiler Application for those needing to delegate others as a preparer or fiscal role.
- PCard Travel Guidelines
- 2016 Standard Mileage Rates for Business
- Most commonly used RCUH Travel Form
- UH Procurement- Kuali Financial Systems (KFS) - Firefox, Safari and Chrome are recommended browsers
- Kuali Training Site - tutorials and forms
- eThority - reporting tool for Kuali to find out balances, expenditures, etc. on your accounts
- RCUH Travel Policies and Procedures Section 2.601 RCUH Employee Travel
Cashier

Transcript - Mail Ordering  Complete this Transcript Request form (pdf) and mail it to the UHMC Admissions and Records Office with payment by check or money order. Do not send cash via mail.

Transcript - Online Ordering  For an additional $2.25 processing fee, order your transcript online through National Student Clearinghouse. Payment is only by debit/credit card (must have a valid email address).

Purchasing Forms

- Form 56 - Purchase of Meals and Refreshments
- Form 63 - UH Services Contract
- Form 65 - Request for Sole Source
- Form 68 - Information Required for Formal Bid
- Form 95 - Determination of Cost or Price Reasonableness (Non-WSCA)
- Form 136 - Protocol Purchases
- Form 144 - OPRPM Sole Brand Justification form
- Form 148 - SuperQuote Exception Form
- Form 152 - Request for Emergency Procurement
- Form 158 - Report of Procurement Violation
- FSO 30 - Interdepartmental Order (IDO)
- PCard Phone Order Log
- Hazardous Procurement Form
- Hazardous Inventory Form
- Hazardous Waste Inventory Form
- Telecom Request Form
- W-9 Form

Inventory

- FMIS-74 - Equipment Transfer
- FMIS-76 - Disposal Application
- PFMO Form 30 - Receipt for Temporary Off-Campus Use of University Owned Property
- RMP-001 - Report of Loss or Damage of State Property

PCard Forms

Form 139 - Purchasing Cardholder information - This is the PCard application for new cardholders. Fill out the personal information and your Fiscal Office will fill out the accounting information, limits, etc.

Form 141 - Memorandum of Understanding - Basic PCard agreement between your Approving Official and UH. Only 1 form per Approving Official is required.

Form 142 - FA/Dept Coordinator Agreement - Basic PCard agreement between your Fiscal Administrator/Dept. Card Coordinator

Form 143 - Cardholder Agreement Form - Basic PCard agreement between the Cardholder and UH

Phone Order Log - Used to log phone order transactions. Note: to use the form, download it as a PDF.
Sub codes

Sub codes provide a way of organizing the various types of purchases that can be made. The full Kuali sub code list can be found here.

Procurement and Payment Resources

eThority - Reporting tool for Kuali
Financial Management Office
General Principles - Procurement
Hawaii Compliance Express
Kuali Financial System (KFS) UH Portal
Kuali Training Site - Tutorials and forms
Object Codes

Travel Forms

- DISB-04 - Manual Travel Form
- DISB-4 - Travel Form
- DISB-4B - Multiple Destination/Multiple Rate Worksheet
- DISB-4C - Per Diem/M&IE/Lodging Tax Calculation Worksheet
- DISB-4D - Receipt Summary Worksheet
- DISB-4E - Excess Commercial Lodging Expense Certification Form
- DISB-33 - Personal Automobile Mileage Voucher

RCUH Travel Forms

Travel Request Advance Form

Current RCUH Travel Rates

Policy on Claims by Car Rental Companies [letter]

Frequently Asked Q&As on Travel

Travel Completion Report
KFS Training Manuals and References

Import Lines - Training Manual
Intro to KFS - Training Manual
KFS Fundamentals - Training Manual
Kuali Glossary
Search Criteria Quick Reference Guide

KFS - On-Line Tutorials

Copy an Account
Conducting a Basic Document Search
Conducting a Saved Detailed Search
Create a Disbursement Voucher
Logging In and Out of KFS
Understanding The Interface
Using Wildcards to Conduct a Search
Using the Search Magnifying Glass
View Available Balances

KFS Tips

Common Document Type Codes (07/02/2012)
Correcting Your Personal Information in KFS (07/10/2012)
Document Search (07/02/2012)
Import Accounting Lines (09/14/2012)
KFS Training Notification Email Messages (07/17/2014)
Managing Pop-Up Blockers in Firefox (07/02/2012)
Managing Pop-Up Blockers in Internet Explorer (07/02/2012)
Potential Sensitive Data Was Found on the Document Message (08/03/2012)
Save Your Document (07/02/2012)

KFS Extended Bascis Manual Link

- Create a Requisition
- Create a Disbursement Voucher
- Search for Payment Status
- View Available Balances
- Configure the Action List
Vendor - Training Manuals and References

The following training manual is provided by the UH KFS System Office. Objectives are to train on how to: Search for a Vendor, Edit and Create a Vendor, and Create a Division of a Vendor.

Working With Vendors - Training Manual

Vendor - On-Line Tutorials

Create a Division for a Vendor
Create a Vendor
Editing a Vendor
Search for a Vendor

Vendor - Tips

Adding Attachments When Creating a New Vendor (07/25/2012)

Adding Vendor Addresses (07/25/2012)
Vendor Address Abbreviations (07/10/2012)

Vendor Address Field (07/10/2012)
Vendor Naming Conventions (07/10/2012)
Using a Vendor With No Order Address (07/10/2012)

Vendor Links

Hawaii Compliance Express
State Procurement Office (SPO) Price Lists and Vendors Site
W-9 Form
Purchasing - Training Manuals & References

Purchase Order - Training Manual
PURAP Encumbrance Workshop Manual

Purchasing - On-Line Tutorials

Search for a Purchase Order
Purchase Order Void
Purchase Order Amendment
Purchase Order Amendment After Payment
Create a Requisition
Approving a Purchase Order
Approving a Payment Request
Checking the Status of an Open Encumbrance

Administrative Policies

AP 8.851 Employee Out-of-State and Intra-State Travel
AP 8.266 UH Purchasing Card Administrative Procedures
AP 8.220 General Principles
AP 8.225 Limitations in Purchasing
AP 8.250 Small Purchases
AP 8.265 Specialized Purchasing
AP 8.561 Tax Treatment of Non-Svc Financial Asst for Individuals
Links

eTravel Website, FAQs and System login
http://www.hawaii.edu/etravel/

Profiler System for Travel Arrangement Delegation
http://www.hawaii.edu/profiler/

Currency Travel Portal
http://www.oanda.com/currency/converter/

Policy Governing Travel APM A8.851
http://www.hawaii.edu/etravel/forms/APM_A8851.pdf

Federal Allowable Rate per Diem Rates
http://www.gsa.gov/portal/category/104711

State of Hawaii Circular 2007-03
Intra-State and Out-of-State Travel Procedures

Administrative Procedure No. A8.851 provides guidelines and procedures for University employees and affiliates under the authority of the Board of Regents Policy, Part D, Chapter 8-7, and in accordance with the Internal Revenue Service (IRS) requirements and collective bargaining agreements. These guidelines and procedures apply to all State and extramural sources of funds.
## Procurement Definitions

**Construction** - The process of building, altering, repairing, improving, or demolishing any public structure or building, or other public improvements of any kind to any public real property. Includes the routine operation, routine repair, or routine maintenance of existing structures, buildings, or real property.

**Exempt Purchase** - a purchase that is exempt from the requirements of the Hawaii Public Procurement Code, Chapter 103D, HRS.

**Goods** - All property, including but not limited to equipment leases, materials, supplies, printing, insurance, and processes, including computer systems and software, excluding land or a permanent interest in land, leases of real property, and office rentals.

**Kuali Financial System (KFS)** - a modular financial accounting system designed to meet the needs of higher education. The University of Hawaii (UH) has implemented the following KFS modules: Chart of Accounts, General Ledger, Financial Processing, Labor Ledger, Accounts Receivable, Contracts and Grants, Purchasing, Accounts Payable and Capital Asset Management.

**Procurement** - the buying, purchasing, renting, leasing, or otherwise acquiring of goods, services, or construction including all functions that pertain to the obtaining of goods, services, or construction such as description of requirements, selection and solicitation of sources, preparation and award of contracts and all phases of contract administration.

**Services** - The furnishing of labor, time, or effort by a contractor.

**Sole Source** - This type of procurement applies when there is only ONE source available from which goods, services, or construction may be obtained.

**State Procurement Office (SPO)** - procures and manages price list and vendor list contracts on behalf of Executive branch agencies, and any of the other twenty chief procurement officer (CPO) jurisdictions, including the Judiciary and the Legislative branches and the counties that commit to participate in the contracts issued by the SPO.
P-Card Definitions

Approving Authority - Individual who is authorized to certify that the purchase supports program objectives. This individual must be someone other than the Department Liaison. For federal contract and grand expenditures, authorization must be certified by the Principal Investigator or designee.

Approving Official - The University official, i.e., Vice President, Chancellor, Dean or Director, who must assign a Department Liaison, select the Cardholders and determine the Cardholders' limits.

Card Issuer - The bank with whom the University has contracted to issue Purchasing Cards to University employees, to bill the University for all purchases made on the cards, and to make payment to merchants on behalf of the University.

Cardholder - An employee of the University who is approved by her/his Approving Official to use the Purchasing Card to execute purchase transactions on behalf of the University and is accountable for all charges made with that card.

Default Account - The 10-digit account/subcode assigned to a Purchasing Card. All charges made with a Purchasing Card will be posted to the card's default account by the card issuer unless the charge is reallocated.

Department Liaison - Employee(s) in each department who will be responsible for proper use of the Purchasing Card within the department. Normally, the department fiscal officer is the Department Liaison. Some organizations within the University may divide the work among several fiscal officers.

Documentation - A merchant produced or non-University document that records the relevant details for each item purchased including quantities, amounts, a description of what was purchased, the total charge amount and the merchant's name and address, e.g., sales slips, original invoices, merchant receipts, telephone order records, transaction logs, Purchasing Card slips, packing slips, etc.

Monthly Spending Limit - A dollar limitation of purchasing authority assigned to the Cardholder for the total of all charges made during each monthly billing cycle. This amount may not exceed $25,000. Departments may establish lower limits on a per Cardholder basis.

Parceling - Purchasing goods or services greater than $2,500, and intentionally separating the payment into two or more transactions to purposely evade the transaction limit.
Pro Value Services (PVS) Net - Internet reporting system that provides users the ability to review and report on information from transactions made on the Purchasing Card. Department Liaisons and/or Cardholders can see the results of all purchase activity within days after the transactions have been posted. PVS Net allows the user to reallocate expenditures and enables the University to download transaction information for recording to the University's Financial Management Information System (FMIS).

Purchasing Card - A corporate liability card issued to an individual employee of the University for the purpose of making authorized purchases of goods and services on behalf of the University with a value less than such amount designated by the University.

Purchasing Card Administrator - The central administrator located in the Office of Procurement and Real Property Management (OPRPM) who administers the Purchasing Card program for the University and acts as the University's intermediary in correspondence with the card issuer.

Transaction/Charge Limit - A dollar limitation of purchasing authority assigned to the Cardholder for each total charge made with the Purchasing Card. This amount must not exceed $2,500. Departments may establish lower limits on a per Cardholder basis. A single transaction/charge may include multiple items but cannot exceed the transaction limit.
Travel Definitions

**Federal Allowable Rate (FAR)** - The maximum allowable rate for per diem (lodging and M&IE) set by the General Services Administration (GSA) for CONUS travel, and by the Department of Defense for OCONUS travel.

**Intra-State Travel** - Authorized travel within the State of Hawai‘i which includes inter-island travel (one-day trips where the traveler leaves and returns on the same day, overnight trips on research vessels in Hawaiian waters, and trips that require overnight absence), and on-island travel (travel on the same island that requires overnight absence). “Travel” on the same island not requiring overnight absence, does not qualify as intra-state travel.

**Lodging** - Allowable expenditure to cover the lodging costs of intra-state and out-of-state travel, where such lodging costs are necessary and reasonable.

**Meals & Incidental Expenses (M&IE)** - The maximum amount authorized for daily meal and incidental expenses determined by the business destination set by U.S. General Services Administration for CONUS travel and the Department of Defense for OCONUS travel.

**Out-of-State Travel** - Authorized travel outside the State of Hawai‘i to the United States (U.S.) and its territories and foreign localities. Some procedural and accounting differences distinguish mainland U.S. travel (CONUS - Continental U.S.) from foreign travel (OCONUS - Outside Continental U.S.), i.e., special per diem rate additional approval requirements, separate subcodes, etc.

**Per Diem** - Allowance for lodging, meals and related incidental expenses. A maximum specified amount for each day of authorized intra-state or out-of-state travel is established by collective bargaining agreements.