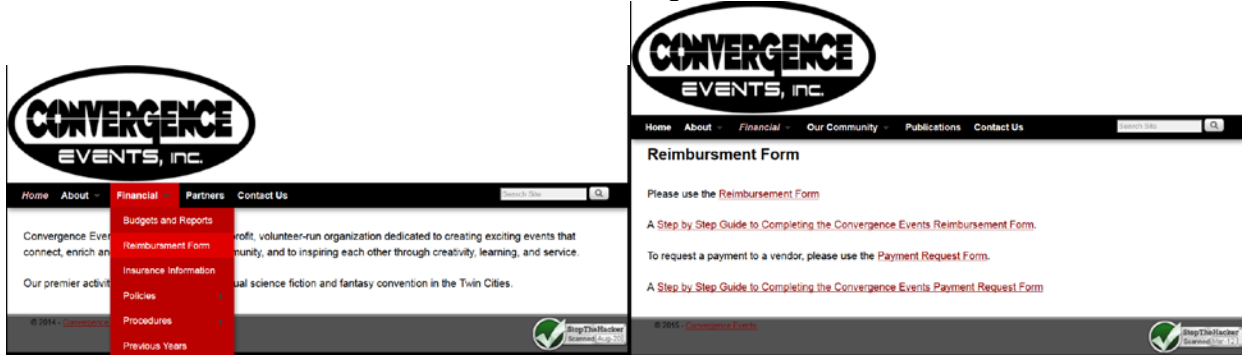


# Step by Step Guide to Completing the Convergence Events Payment Request Form

The Payment Request Form can be located by going to [www.convergenceevents.org](http://www.convergenceevents.org). There is a link to the form under the Reimbursement heading.



## Step 1: Department Information

The first step in completing the Payment Request Form is to enter department information. All fields must be completed.

Department

Date

Department Head Requesting Payment

Budget Line

**Department:** Enter the department that this purchase is for.

**Date:** Enter the date that you are submitting the request

**Department Head:** Enter your name. Only Department Heads may request payments.

**Budget Line:** Enter the budget line that the payment should be charged to.

## Step 2: Indicate if Order Has Been Placed

After entering the department information you will indicate if an order has been placed or if an order needs to be placed.

**Order has been placed and needs payment**

Invoice, bill, order confirmation, or other documentation must be included with this form.

**Order needs to be placed**

Fill in order information below or provide in attachment

**Order has been placed and needs payment:** Select this checkbox if you have already placed the order and the vendor simply needs to be paid. Include any documentation the vendor has given you, such as an invoice or bill. If you select this checkbox, you do not need to complete any of the informational boxes below.

**Order needs to be placed:** Select this checkbox if you have not placed the order and need the Finance Department to place the order for you. After checking this box, please complete the remaining informational boxes.

### Step 3: Complete Informational Boxes

If your payment request is for an order that needs to be placed, please fill in the following boxes with as much information as possible. Alternately, all information may be included in a separate attachment.

#### Vendor Information

Vendor Information (website, phone number, etc.)

Enter any information the Finance Department will need to contact and place your order. Depending on the order, this will likely be a website, but could be a phone number or other contact method.

#### Delivery Instructions

Delivery Instructions

While the Finance Department will place your order for you, the Finance Department will not receive your order. Please indicate here any delivery instructions, including but not limited to name, address, special instructions, etc.

**Items to be Ordered**

Items to be ordered

List all items to be ordered here. Please provide as much information as possible, including item numbers, names, quantity, etc.

**Estimated Total**

Estimated Total: \_\_\_\_\_

Check if estimated total includes shipping

Enter the amount you anticipate your order will cost. If your estimate includes shipping, please check the corresponding box.

**Step 4: Submit Request**

After the form has been completed, email it to [finance@convergence-con.org](mailto:finance@convergence-con.org) or give to the Finance Department Head. Unlike a Reimbursement Request, a second Department Head (or Director) is not needed.