

- ▶ This guide demonstrates how to complete **Licenses/Certification Payment Request Form**.

1. The **Licenses/Certification Payment Request (LCF)** may be used to pay license or certificate invoices where a purchase order is not otherwise required (and has not been issued) to accomplish direct pay for the license or certification. Licenses or certificates (including renewals) can be paid by the University only if they were NOT required of the employee in order to originally gain employment in their current position. If the license or certificate is required to gain employment, the expense cannot be paid by the University.

▶ Accessing the Licenses/Certification Payment Request Form

1. From **cc.ou.edu** login with your 4x4.
2. From the main navigation menu select **Shop » View Forms** from the **Go To** menu or select **Forms** from the main workspace under the searching bar.
3. Select the **Payment Forms** folder from the left side of the screen.
4. Click on the form titled **Licenses/Certification Payment Request (LCF)**.
5. The form will pop up in a new window.

Filling out the Licenses/Certification Payment Request Form

1. **Enter Supplier:** Enter the supplier name. As you type, the supplier name should appear. Please ensure that the fulfillment address is correct. If it is not, click **select different fulfillment center** to select an alternative location.
2. **Description:** Enter in a brief description of the membership, including the individual's name if it is an individual membership.
3. **Invoice Amount:** Enter in the full amount of the invoice.
4. **Invoice Date:** Enter in the date listed on the supplier's invoice.
5. **Service Begin Date for this Payment:** Enter in the date the service began.

6. **Service End Date for this Payment:** Enter in the ending date for the service.

7. **Date IC Form Approved by HR:** Enter in the date the Independent Contractor form was approved by HR. Note that approved independent contractor forms must be less than one year old.

8. **Supplier Invoice Number:** Enter in the unique invoice number from the supplier's invoice.

9. **Describe how this expense benefits the University:** Enter in a brief description of how the membership benefits the University or why the membership

10. **Copy of invoice & supporting documentation/Internal Attachments:** Attach the electronic image of the invoice to the form. Select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**. Note that the Independent Contractor form approved by HR should not be attached.

- ▶ **All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) MUST be removed from attached documentation.**

Available Actions

- ▶ Once the form is complete, you will need to select the appropriate action from the dropdown list of Available Actions.
 - ▶ The Available Actions menu provides options when completing a form.
1. **Add and go to Cart:** This option adds the current form to your shopping cart and returns you to the shopping cart screen.
 2. **Add to Cart and Return:** This option adds the current form to your shopping cart. The form page displays with the previously selected supplier and all

other fields are reset to blank.

3. **Add to Cart:** This option adds the current form to your shopping cart. The form page remains completed. This option eliminates redundant data entry by using the existing form data as a template.
4. **Add to Draft Cart or Pending Req/PO:** This option adds the form to a draft cart instead of the active shopping cart.
5. **Add to Favorites:** This option will allow you to add this form to your Favorites. See **Creating and Using Favorites** for more information.

Other Payment Request Forms

- ▶ CrimsonCorner has several other payment request forms setup for particular types of payments.
 - ▶ These forms will require specific information to be entered in order to pay the invoice.
 - ▶ Note that use of the wrong form may result in the invoice being cancelled.
2. **Food & Beverage Payment Request (FBF):** The Food & Beverage Payment Request (FBF) may be used to pay invoices for food & beverages where a purchase order is not otherwise required (and has not been issued) to accomplish direct pay to a supplier. For more information, see the Food & Beverage policy at <http://www.ou.edu/controller/fss/policies/food.pdf>.
 3. **Independent Contractor Payment Request (ICF):** The Independent Contractor Payment Request form (ICF) may be used to pay expenses for independent contractors who are US citizens for tax purposes after Human Resources has approved the payment as an independent contractor (with a social security number). Payments to individuals who are not treated as U.S. citizens for tax purposes CANNOT be paid on this form. Please forward paper copies of invoices for these payments directly to Financial Services.

4. **Licenses/Certification Payment Request (LCF):** The Licenses/Certification Payment Request form (LCF) may be used to pay license or certificate invoices where a purchase order is not otherwise required (and has not been issued) to accomplish direct pay for the license or certification. Licenses or certificates (including renewals) can be paid by the University only if they were NOT required of the employee in order to originally gain employment in their current position. If the license or certificate is required to gain employment, the expense cannot be paid by the University.
5. **Membership Payment Request (MPF):** The Membership Payment Request form (MPF) may be used to pay membership invoices where a purchase order is not otherwise required (and has not been issued) to accomplish direct pay for the membership. Please note that the beginning and ending dates of the membership are required on the form. Membership payments cannot be made for periods greater than one year. Payment up to six weeks in advance is allowed only if the membership includes a subscription.
Phone/Data/Internet Payment Request (PPF): The Phone/Data/Internet Payment Request (PPF) may be used to pay for mobile device invoices, land-line phone invoices, and data/internet access invoices where a purchase order is not otherwise required (and has not been issued) to accomplish direct pay to a supplier. Note that the preferred payment method for cell phone charges is by Pcard if the expense is under \$5,000.
6. **Royalty Payment Request (RPF):** The Royalty Payment Request (RPF) may only be used to pay royalties.
7. **Subscription Payment Request (SPF):** The Subscription Payment Request (SPF) may be used to pay subscription invoices where a purchase order is

Step-by-Step Guide

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not otherwise required (and has not been issued) to accomplish direct pay for the subscription. Please note that the beginning and ending dates of the subscription are required on the form. Financial Services cannot pay for a subscription more than six weeks prior to the beginning date.