Forms Glossary

**Purchasing Forms**

**Change Request**: Used to modify an existing Purchase Order (i.e. increase funds, change PTA, cancel PO, and extend/renew existing agreement).

**Declining Balance**: Used to create a Blanket PO, Consulting Services Agreement and a Service Agreement with an upfront amount that will decline as invoices post against the PO.

**JPL Work Order Form Request**: JPL Work Orders transactions.

**Research Subcontracts Declining Balance**: Used for requesting new Research Subcontracts.

**Specialty Gas – Airgas***: Used for new Airgas specialty gas orders that cannot be ordered through the Airgas Punchout Catalog.

**Spot Buy**: Used to purchase goods and materials when a Quote is provided.

**Supplier After-the-Fact**: Unauthorized transactions made on behalf of Caltech that are against Caltech purchasing policies and procedures. All After-the-Fact purchases, regardless of dollar value, require justification & financial approval.

*Instructions on how to order using the Airgas Form:*

[http://procurement.sites.caltech.edu/contracted-suppliers/airgas](http://procurement.sites.caltech.edu/contracted-suppliers/airgas)
**Employee Reimbursement Request:** Out of pocket reimbursement for staff, faculty, and students for items that are not listed on the [Payment Request Usages list](#). Considered unauthorized orders and require justification.

**PTA Payment Request:** Payments to Individuals or Suppliers for items specifically designated on the [Payment Request Usages list](#). Approved list of expenses that do not require a Purchase Order.

**PTA Wire Transfer Request:** Payments to Individuals or Suppliers for items specifically designated on the [Payment Request Usages list](#) and requiring payment via Wire Transfer (international). Approved list of expenses that do not require a Purchase Order.

**JPL Wire Request:** Custodian form used by Post Award Admin for wire payments to JPL.

**PTA Petty Cash Replenishment Request:** Custodian form used by Petty Cash Custodians to request replenishment of their Petty Cash Fund.

**GL & Mixed GL/PTA Payment Request:** Custodian form used to process Payment Requests that are expensed to a GL Code.

**Design & Construction Retention Request:** Custodian form used to process Design and Construction Oracle PO invoices that require posting to a retention GL account.

**Request to Add or Update Supplier:** Custodian form used by Procurement Staff and SOS Buyers to request a new supplier or update to existing supplier.