



Tier III Organization Procedures

Purchase Requests

Guide for purchasing (goods, services, & travel).

UConn

STUDENT ACTIVITIES

TRUSTEE STUDENT
ORGANIZATION SUPPORT

Vendor Set-up in HuskyBuy

You have reviewed the financial decision-making process and the Flowchart diagram, what's next?

If you're using HuskyBuy to make a non-catalog purchase, either a PSA or and your preferred vendor is NOT active in HuskyBuy already, be sure you've allowed extra time in the process and do the following:

- On the HuskyBuy homepage, under Reference: Choose New Supplier Request.
- Complete the vendor contact information and the vendor will be sent an invitation to set themselves up.
- The email invitation will come from huskybuysupport@uconn.edu ,so advise the vendor to watch for this email and check their spam if needed.
- Most vendors are delighted to have the business and follow through with the set-up process. If they need support, let us know. Make sure they understand that time is a factor as the set-up must be completed before the requisition can be done and the requisition must be done well in advance of the date proposed for the service. If they are unwilling, move on a find another vendor!

A PSA (Personal Service Agreement) can be used for any personal services (speaker, performer, entertainer, any other service related to a performance), but must be utilized if over \$1,000.

Directions for utilizing a PSA can be found at:

<https://contracting.ubs.uconn.edu/psa-procedure/>



Pre-Purchase Documentation I

Get your documentation into a single PDF in the following order:

Minutes

Ensure you have the page or pages of your minutes with the motion that supports this purchase. Also, be sure that on every page of your minutes is an indication of the group, date of the meeting, type of meeting and an indication of what page or pages were provided out of how many total, eg. Page 3 of 5

Funding Packet

If you're a student government organization and your purchase is as a result of the funding of a Tier II Organization, insert the funding request and subsequent action. If not funding related, you can skip this.

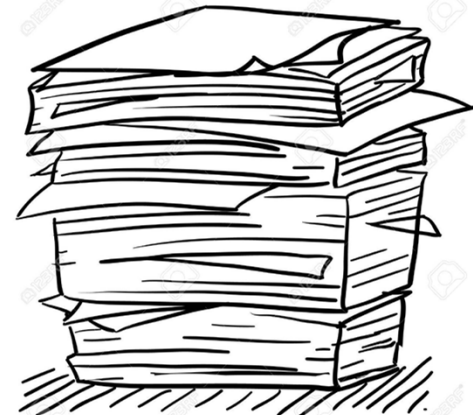
Event

If this is an event, be sure you know date, time, invitees, description and location. You will also need to provide the advertising material which supports who is invited which is likely the base of your justification. If it is not an event, you can skip this.

Off-Campus Activity Advising Form (OCAA)

For event or travel off-campus for Storrs groups, Org must include the Off-Campus Activity Advising Form with PR. They need it from Orgs at least 14 days prior to event/travel. Regional Campuses can use this process or submit the equivalent from their campus.

<https://studentactivities.uconn.edu/off-campus-activity-notification-form/>



Pre-Purchase Documentation II

Design Proof and Branding

If the purchase requires custom artwork, for promotional items or advertising, org must submit that artwork that is part of the process. If UConn branding approval is required, include that approval.

MarketPlace Set-up Form

If the purchase involves the use of MarketPlace for students to sign-up or pay a portion or for the entire cost for a non-student guest, the MarketPlace set-up form should be submitted as part of the purchase request.

Travel

If travel is involved, submit info (game schedule or conference info), itinerary and OCAA Form (*see prev page*).

Mileage

If mileage, submit mileage affidavit with map of shortest distance

Quote(s)

If you did an RFQ, submit the specifications sought. If under \$5K, you may only submit the lowest cost vendor chosen for the purchase. However, you must keep the losing quotes (should have at least two others) in org records as you may be asked to produce them during the review. If \$5K or over, you must include in the packet the other two quotes OR if the vendor is a sole source provider, complete the associated form to document that fact: https://media.procurement.uconn.edu/purchasing/images_resources/forms/SoleSource.pdf

Correspondence

If there is correspondence you feel would be helpful to include, feel free to do so at the end

Then, combine it in this order in a single PDF.



Titling the PDF

The title of PDF will be the same as the title of the request at the first screen within UCONNTACT. The titling drives the handling of the request as well as facilitating electronic filing and recall.

The naming convention is as follows:

{ORG} {TOTAL VALUE} {PURCHASING METHOD} {VENDOR} {DESC} {EVENT DATE, as applicable}

ORGANIZATION ABBREVIATION EXAMPLES: (Pick as you like as long as it is differentiated from others)

AP, DC, GSS, HFD, NTMG, SBA, SSW, STM, USG, PIRG, UCTV, WTBY & WHUS

PURCHASING METHOD (Use the Decision Tree to help identify the Purchasing Method)

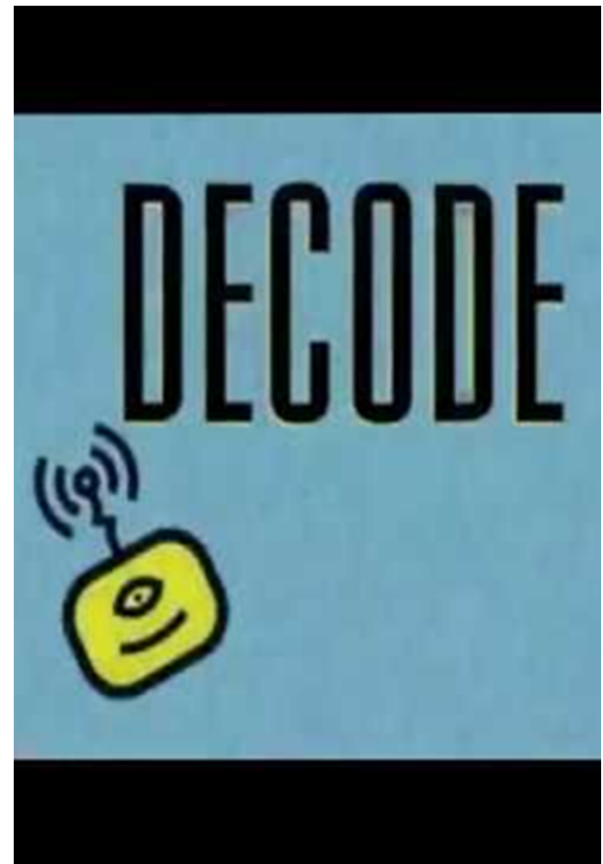
<u>Method</u>	<u>Use in PR Naming</u>	<u>Appears on Monthly Bill</u>
University Department	UNIV	CLTR, IB, PAYR, SB
HuskyBuy Contract	HBCO	PREQ
HuskyBuy Catalog	HBCA	PREQ
HuskyBuy PSA	PSA	PREQ
HuskyBuy Blanket PO	BPO	PREQ
Husky Buy Non-Catalog	HBNC	PREQ
ProCard	PCDO	PCDO
Travel	TRAV	PCDO
Reimbursement	REIM	N/A



Titling Examples

Each has: **Org**, **Amount**, **Purchase Type**, **Vendor**, **Brief Description** and **Date**, if applies

- AP \$236 UNIV Mort's WOW I-Fair 9-6-20
- DC \$836 HBCO Presto Print WOW Stickers 9-6-20
- NTMG \$398.50 HBCA WB Mason F20 Off Supp
- HFD \$3000 PSA Bob Newhart WOW Comedy 9-6-20
- STM \$1200 BPO Sally's Cafe F20 Training Days
- USG \$4500 HBNC Virtual Fun WOW Games 9-6-20
- PIRG \$330 PCDO GovConn Adobe Renewal
- UCTV \$4000 TRAV Sanditz Football Tampa 9-9-20
- WHUS \$24.20 REIM J Patel Ref F20 Trng 9-6-20

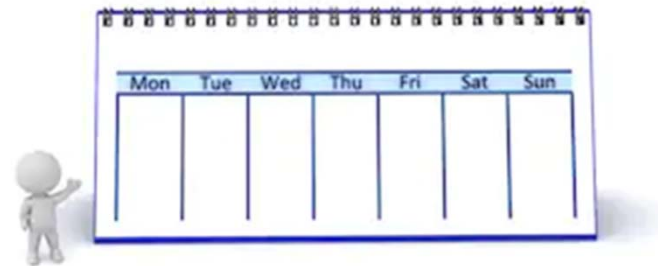


Preparing to Submit a PR

Check with your organization on any **INTERNAL PROCESSES** before you submit your PR

All purchase requests should be submitted via **UCONNTACT**, along with proper supporting documentation, for approval by organization Treasurer and President followed by review by TSOS.

Time the submission of your PR so that TSOS has **AT LEAST A WEEK PRIOR** to when you need the order submitted to a vendor. While we endeavor to turn requests down within a day or two, we could have questions, high workflows or be out sick or on vacation. Some things take more time such as setting up a vendor in HuskyBuy, creating a PSA or purchases over \$10K that must involve Procurement. Don't let your event fail because you didn't submit your requests in time!

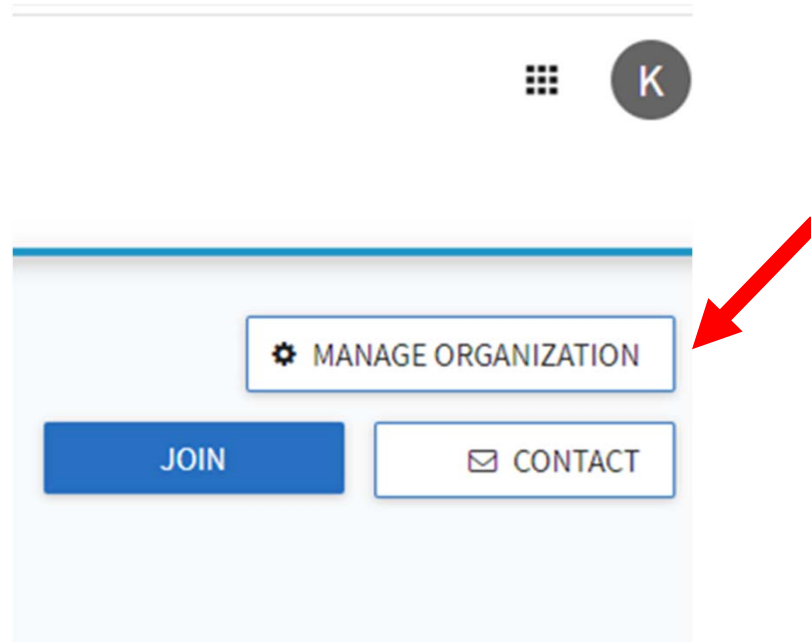


If an **EVENT** is involved, you will be asked for that information, date(s), time(s) and advertising (flyer, email blast, social media posts) so have it at hand before you start

WHO will the purchase benefit - is it all your constituents, a certain club (roster should be part of the funding request) or is it your organization (include roster). Many times, you will have to submit attendance after the purchase but if you know the beneficiaries beforehand, provide those names.

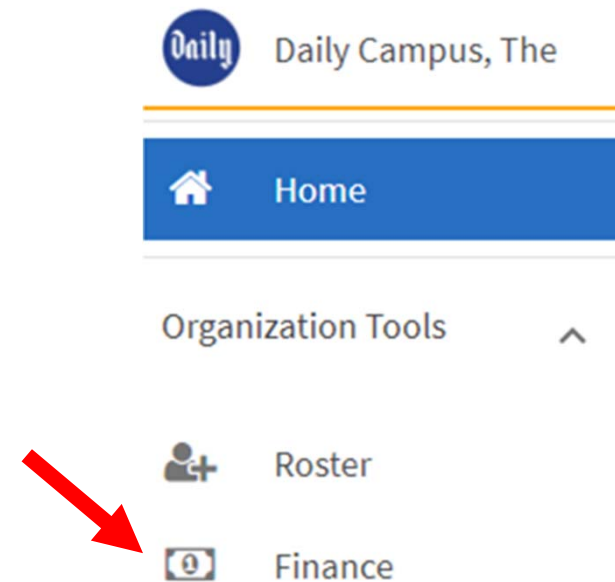
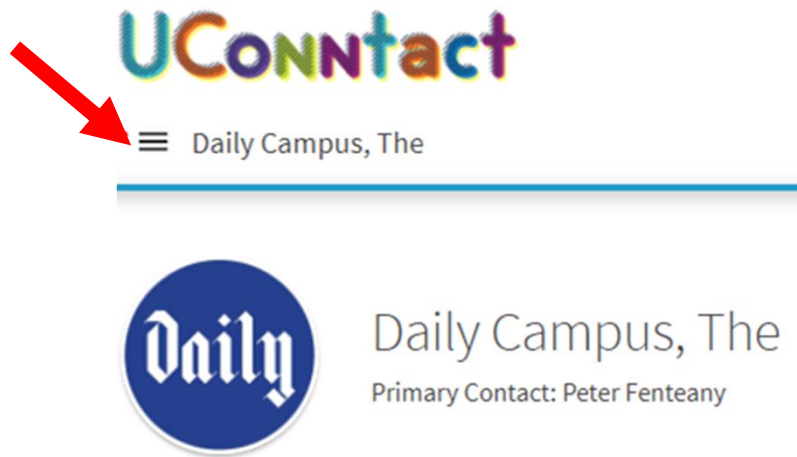
UCONTACT Sign-on

- 5- Ywrrk\$}syv\$sq tyxiv@reznkexi\$ss\$ygsrrxegx2ygsrr2ihy
- 2) Navigate to your Organization Page, eg Daily Campus
 - 3) Choose Manage Organization on right



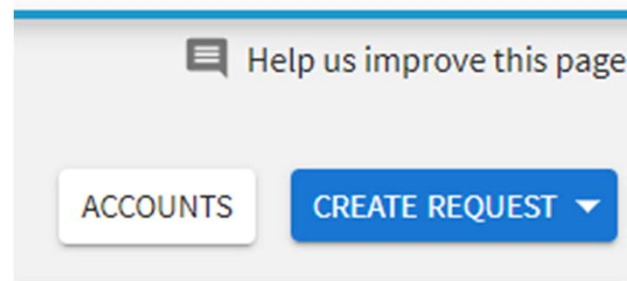
Getting to Finance

- 1) Click on the three bars on the left
- 2) A menu will slide open on your left
- 3) Choose Finance



Creating the New Request

- 1) On right side, choose Create Request
- 2) A menu will slide open on your left
- 3) Choose Create Request dropdown then Create Budget Request



Request Title & Description

1) Choose the Process Titled:

Trustee Student Org Purchase Request (Trustee Org Funded ONLY)

2) Indicate the Request Title (should be the same as your PDF)

Org Amount Purchase Type Vendor Brief Description Date (if applies)

3) Describe the purchase

4) Hit Next

Budget: Purchase Request Information

REQUEST

* Request Title (Required Field)

Description

CANCEL PREVIOUS NEXT

Org Name & Subset

- 1) Find your Org Name on the Pull Down Menu
- 2) Indicate Committee, Program or T2 RSO Name, if applicable

Choose the Organization funding this Purchase:

⊕ Avery Point ASG (KFS# 3124330)

Indicate Committee, Program or T2 RSO Name, if applicable:

⊕ Daily Campus (KFS# 3124420)

Purchase Method

Indicate how the purchase will be made (Use Decision Tree):

This purchase request will ultimately be paid through the following means which are listed in order of preferred consideration:

UNIV - Service/Product from University Department eg catering, document production (CLTR, IB, SB on Monthly Bill)

HBCO - University Contract via HuskyBuy eg promotional items, bus (PREQ on Monthly Bill)

HBCA - HuskyBuy Catalog eg WB Mason, Gov Connection (PREQ on Monthly Bill)

PSA - HuskyBuy Personal Service Agreement eg speaker (PREQ on Monthly Bill)

BPO - HuskyBuy Non-Catalog Blanket Purchase Order eg Multiple identical/similar purchases from product/service provider (PREQ on Monthly Bill)

HBNC - HuskyBuy Non-Catalog Purchase eg single purchase from product/service provider (PREQ on Monthly Bill)

Stewardship & Beneficiaries

1) Confirm Stewardship:

By submitting/approving this Purchase Request, we attest:

- i. the information is complete and accurate,
- ii. we have explored all alternatives to meet the need and this represents the most cost effective,
- iii. the benefit meets or exceeds the cost,
- iv. every effort is being made to pay the vendor directly, and
- iii. the expenditure represents excellent stewardship of student fees by maximizing the benefit to our constituents.

Yes

No

1) If not funding, define beneficiaries:

If this purchase is based on funding for a Tier II RSO consistent with the RSO mission, go to next question, otherwise, define the beneficiaries and provide business justification in one of the following:

EXTERNAL - The direct beneficiaries are those outside your org. Please indicate how this purchase enacts your organization's mission to benefit your constituents and enhance the student experience.

INTERNAL - This directly benefits your org/members. Please indicate how this purchase enacts your organization's mission to benefit your constituents and enhance the student experience.

Vendor Info

Complete Preferred Vendor Name, Contact Info & Details

Vendor Information:

Preferred Vendor Company Name. Please note if also have a DBA

eg. Robert Smith DBA Bobby's Pancakes

Preferred Vendor Website

Representative Name, Email and Phone Number

Quote Number and Quote Date

Date item/service required

Vendor Info

Any extra information you want to add:

7

Additional information you feel should be documented/communicated about this Purchase Request:

Justify use of specific vendor or product in case more cost-effective alternative found:

As the purchase is executed, if a more cost-effective vendor or product is found, purchaser will make that selection. If applicable, justify the following:

We must use the vendor noted above because:

We will only accept the identical product because:

Event

Answer if this purchase is for an event

Is this purchase request associated with an "event"? (an activity with a start and end date and time)

Yes, this purchase is for an event.

No, this is not for an event.

You will then be asked about the Event:

Name

Description

Start Date/Time

End Date/Time

If you're hosting, Method(s) of advertising

“Budget” = Max Purchase Value

Choose + Add Item

Budget: Purchase Request Information

REQUEST ADDITIONAL INFORMATION **BUDGET**


HFD PCDO \$399 Bob's Cafe WoW Refreshments 9-6-20

Requested Total \$0.00

Reviewer Adjusted Total \$0.00


Sections (1)	# of Line Items (0) (Max. 30)	Amount
Expense Type/Code	0	\$0.00

Budget Section:

[Expense Type/Code](#) 

Click Add Item to review purchase categories and enter amounts. Upload a single PDF with all the documentation to the FIRST line Item ONLY, scanned in this order: MOTION then, if applicable -> FUNDING Information including Tier II Roster; EVENT advertising; DESIGN PROOF; MARKETPLACE Set-up Form; TRAVEL Itinerary; Event Info like Game Schedule; Off-Campus Activity Advising Form; Mileage Form and Map; QUOTE(S); and any relevant CORRESP

▲ This section is required.



+ ADD ITEM

“Budget” = Max Purchase Value

- 1) Choose Expense Category
- 2) Choose Name
- 3) Enter Description if helpful
- 4) Enter Quantity
- 5) Enter Cost of Each Item
- 6) CHECK MATH WORKED
- 7) Upload PDF

Title should match PR Title

- 1) Hit Save
- 2) Can add more items but PDF is only attached to first line

1) If PDF too large, send to trusteeorgsupport@uconn.edu

New Line Item

* Line Item Category (Required Field)

602 Dues (Expense)

Payment of membership dues

-Must pay vendor directly - reimbursement prohibited

-Commonly handled via ProCard

-Example: Trustee Organization Membership Fee to National Organization

* Name (Required Field)

Description

* Quantity

1

X

* Cost

\$

=

Total

Cost must be a number.

Upload Support Document (10MB max)

Choose File

No file chosen

CANCEL

SAVE

Submitting

- 1) When done, Click Submit
- 1) If need to come back, Click Finish Later
- 1) After Submission, Treasurer will get email telling them to review the submission
- 4) Treasurer can click on the button right in the email to get review the request

Budget: Purchase Request Information

REQUEST ADDITIONAL INFORMATION BUDGET

HFD PCDO \$399 Bob's Cafe WoW Refreshments 9-6-20

Requested Total	\$0.00
Reviewer Adjusted Total	\$0.00

Sections (1)	# of Line Items (0) (Max. 30)	Amount
Expense Type/Code	0	\$0.00

Budget Section:

Expense Type/Code [🔗](#)

Click Add Item to review purchase categories and enter amounts. Upload a single PDF with all the documentation to the FIRST line item ONLY, scanned in this order: MOTION then, if applicable -> FUNDING Information including Tier II Roster; EVENT advertising; DESIGN PROOF; MARKETPLACE Set-up Form; TRAVEL Itinerary; Event Info like Game Schedule; Off-Campus Activity Advising Form; Mileage Form and Map; QUOTE(S); and any relevant CORRESP

▲ This section is required.

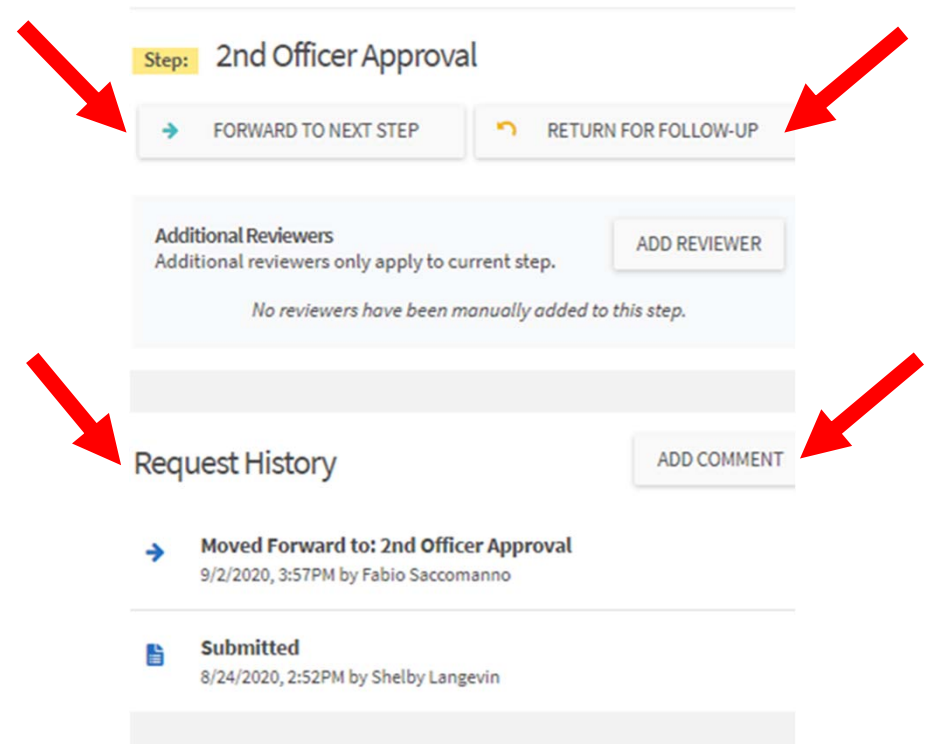
+ ADD ITEM

+ ANOTHER "EXPENSE TYPE/CODE" SECTION

FINISH LATER < PREVIOUS SUBMIT

Taking Action

- 1) Approver can navigate through the screens and download the PDF to complete the Review
- 1) If all is in order, click on “Forward to the Next Step”
- 1) If revision is required, choose “Add Comment” and “Save” to convey what is needed
- 1) Click on “Return for Follow-up”
- 1) Comments can be used for any action but always for returns
- 6) Look at “Request History” for information on who has taken action



Approval

- TSOS is the last step in the process and will “Approve” Compliance and Documentation Check is complete
- Make the purchase up to or equal to the amount that was approved but not beyond (would require new approval)
- Attach purchase documentation to university accounting system (either HuskyBuy or Edoc for ProCard)
- Simultaneous with the entry/purchase should be the Quickbooks Entry
- No purchase should be made until after a PO has been issued or it will be considered an **“Unauthorized Purchase”**
- “Enter Bill” in Quickbooks for all except Check Payment
- Look in UCONNTACT in your org under Budget Requests to see the status of those in progress

Request History



Approved

9/4/2020, 3:55PM by Kimberly Miller

Post Purchase Responsibilities

Student leaders are responsible to ensure all documentation is gathered, added to Quickbooks and provided to appropriate staff in a timely manner

There are 3 things you may need for documentation after:

- 1) Invoice or Original Receipt (Always!)
- 2) Constituent Beneficiaries/Attendees, etc (Almost Always!)
- 3) Prize Form (Occasionally)

All post-purchase documentation should be added to Quickbooks by student leader(s)

HuskyBuy: Invoice must be submitted to apinvoices@uconn.edu (cc: trusteeorgsupport & staff, if applicable), Beneficiaries and Prize Form can be added to the HuskyBuy Invoice

ProCard: Receipt and remaining post-purchase documentation must be added to edoc

Other KFS transactions: Invoice and remaining post-purchase documentation must be added to the edoc with the exception of Service Billings

Questions

Trustee Student Organization Support

Ask first and save time and energy!

trusteeorgsupport@uconn.edu

Trusteeorgsupport.uconn.edu

Office 860-486-6461

Thank you!

