



# Trustee Organization Procedures

## Purchase Requests

Guide for purchasing (goods & services, see travel separate)

**UConn**

**STUDENT ACTIVITIES**

TRUSTEE STUDENT  
ORGANIZATION SUPPORT

# Vendor Set-up in HuskyBuy

You have reviewed financial Decision-Making and the Purchasing Method 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](mailto: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, 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), that are NOT a contracted vendor, but must be utilized if over \$2500.

Directions for utilizing a PSA can be found at:

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



*Use the Statement of Work Template to outline details for a contracted vendor.*

# 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.

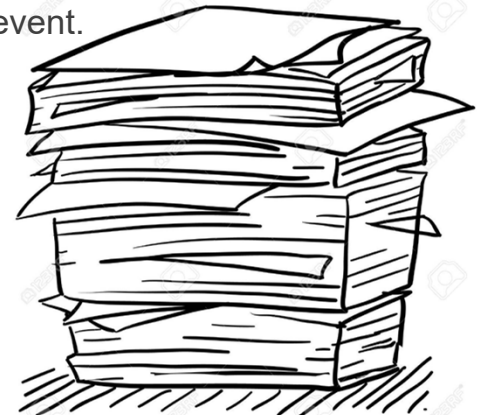
## **Event (anything with an associated timeframe)**

If this is an event, be sure you know dates, times, invitees, description and location. You will also need to provide the approved space reservation, if needed for the event. Include all advertising material in the Purchase Request and submit the final advertising/marketing with post-purchase documentation. Skip if not an event.

## **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 (paid in advance for T3 Travel)

## **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](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)

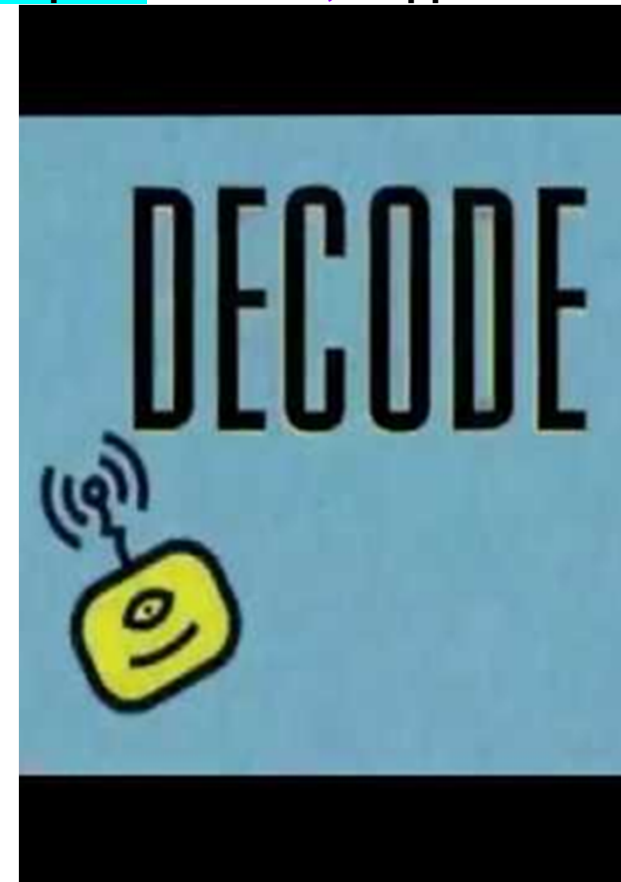
<u>Method</u>	<u>Use in PR Naming Convention</u>	<u>Appears on Monthly Bill</u>
University Department	UNIV	CLTR, IB, PAYR, SB
HuskyBuy Contract	HBCO	PREQ
HuskyBuy Catalog	HBCA	PREQ
HuskyBuy PSA	PSA	PREQ
HuskyBuy Blanket PO	BPO	PREQ
Husky Buy Non-Catalog	HBNC	PREQ
ProCard	PCDO	PCDO
Travel	TRAV	PCDO
Reimbursement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

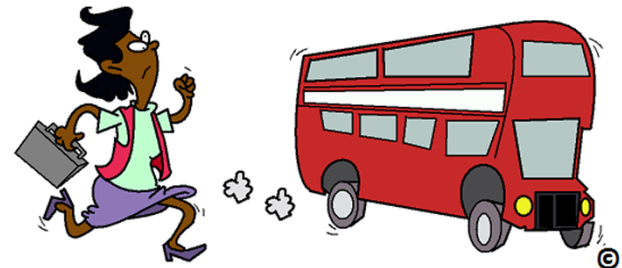
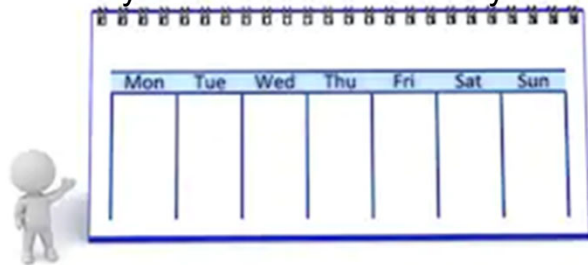


# Preparing to Submit a PR

Check with your organization on any **INTERNAL PROCESSES** before you submit your PR because submitters must have gone through training and be President, Treasurer or designated “Financial Admin”

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

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. The rule of thumb is that orgs should begin planning two months in advance and submit requests a month in advance. Don't let your event fail because you didn't submit your requests in time!

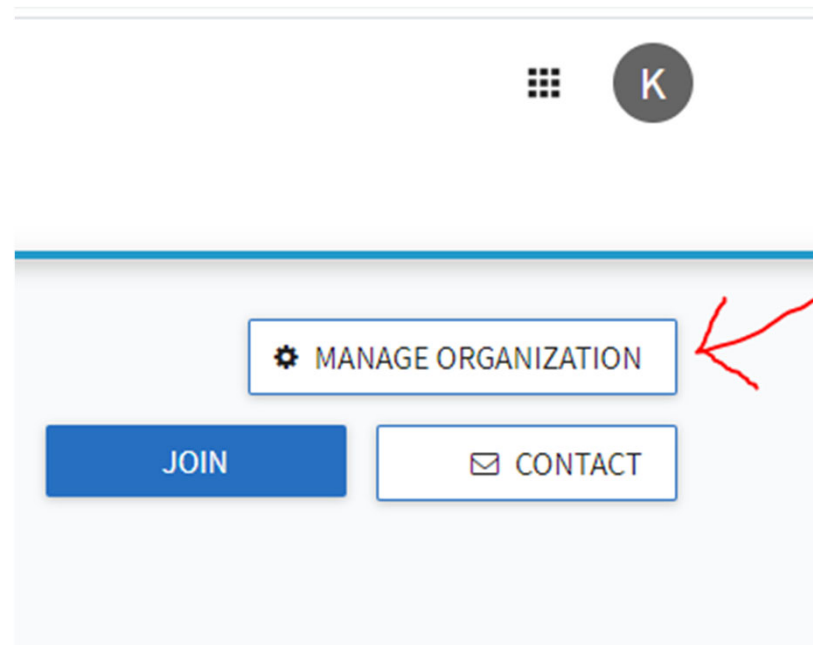


If an **EVENT** is involved, you will be asked for that information, date(s), time(s), space reservation and available advertising (flyer, email blast, social media posts) so have it at hand before you start

**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

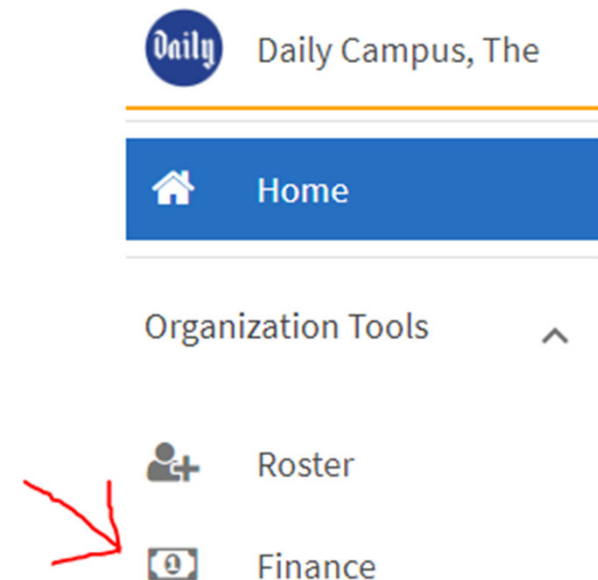
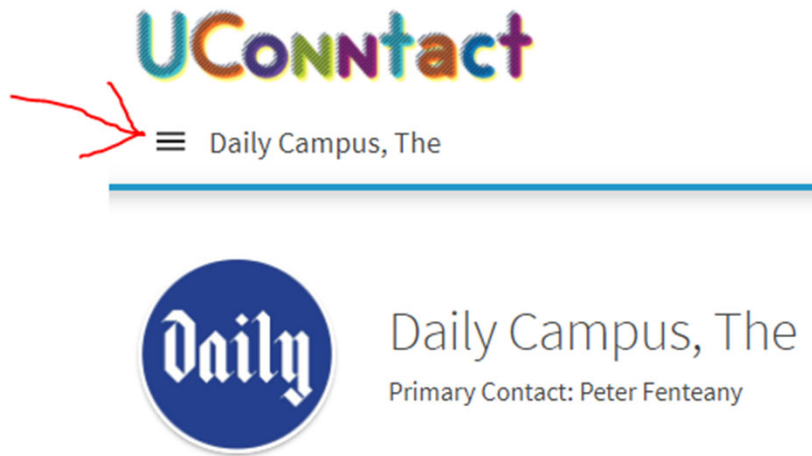
- 5- Ywrrk\$}syv\$gsq tyxiv\$eznkexi\$ss\$ygsrrxegx2ygsrr2ihy
- 2) Navigate to your Organization Page, eg Daily Campus
- 3) Choose Manage Organization on right





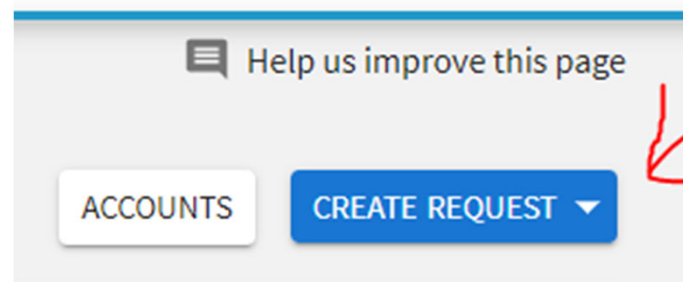
# Getting to Finance

- 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

The screenshot shows a web form titled "Purchase Request Information" with a "Budget:" label. Below the title is a tab labeled "REQUEST". The form contains two main input areas: a text field for "Request Title" (marked as a required field) and a larger text area for "Description". At the bottom of the form, there are three buttons: "CANCEL", "< PREVIOUS", and "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 method for purchase (Use Purchase Method 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

## 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

## 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.

# Justification – Why?

## Justification and Business Purpose (WHY?)

This is very important to document and is usually stated in terms of how the purchase will help your constituents (the students that pay your fee). It need not be long but it is important that it explains it well. For example, this explanation provides more of the why, “Our Org is providing cold drinks during the first day of week of welcome to help provide a welcoming environment for the new students who have a full schedule, ensure all are well hydrated and have our org be a positive presence during the event.” where this just repeats the what, “provide cold drinks for WoW”.

### **Justification and Business Purpose (WHY?):**

**Please indicate how this purchase enacts your organization's mission to benefit your constituents and enhance their 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



# Contact & Delivery Info

## Contact

**Who will be the contact for the Student Org for the delivery of the service/product?**

Name

Student Org and Role

Cell Phone

Email

## Delivery

**Please explain fully, how purchase will be delivered from vendor to org to beneficiary/ies as appropriate:  
eg. "Vendor shipping product to Org via USPS and they will be handed out at in-person event"**

# Additional Purchase Info

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:

Any extra information you want to add:

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

# 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

Location

Start Date/Time

End Date/Time

Estimated Attendance fee-paying students

Estimated number of Total Attendees

# Marketing Attestation

## MARKETING/ADVERTISING ATTESTATION

Marketing/Advertising and commitments may not occur before a TSOS favorable review. Marketing /Advertising the event is critical to its success and thus, to stewardship of the student fees. Final marketing materials for external events must be submitted with other post-purchase documents such as attendance, invoice, etc. Please note that Trustee internal org events/activities and meetings where org members are the primary target audience must submit advertising with this purchase request in advance, eg. agenda, email invitation, social media, etc.

*By submitting/approving this Purchase Request, we attest the marketing for the event:*

- a) will be on platforms and use methods to maximize the opportunity to reach the intended audience (Org Advisors can work with you if there are any questions),
- b) will be timed to ensure the audience has the best opportunity to both, see the advertising, and make plans to attend,
- c) and will include the following information-

**WHO:** Identification of the sponsoring entity/ies, target audience and if guests are welcome

**WHAT:** Full description of the event

*Cont'd on next page*

# Marketing Attestation Cont'd

*Cont'd from previous page*

**WHERE:** Location including map or directions, if helpful (or noting it's virtual)

**WHEN:** Start date/time and end date/time of event as a whole as well as activities within the event, if applicable, and

**HOW MUCH:** Specify if it's FREE or if there's a cost for students, non-students &/or guests (if any charge is involved, MarketPlace form must be attached)

**DETAILS:**

Drop-in or pre-register, if the latter, when does it open/close and how do students access it

Dress code/suggestions

What to bring to the/an activity

Any other helpful information that would be helpful for participants to know



☐ Yes, we agree and recognize we are accountable to market for success as noted above

[Edit Ar](#)

[Delete Ar](#)



☐ No, we don't agree (Request will be returned for revision)

[Edit Ar](#)

[Delete Ar](#)

# “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
- 8) Hit Save
- 9) Can add more items but  
PDF is only attached to  
first line
- 10) If PDF too large, send to  
[trusteeorgsupport@uconn.edu](mailto: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 a Purchase Request

- 1) When done, click Submit
- 2) If need to come back  
Click Finish Later
- 3) After Submission,  
your org's staff support will  
get an email alerting them  
to review the submission.
- 4) If missing anything, they can  
return it to the submitter  
with comments. Otherwise,  
they will "Forward Next  
Step", Treasurer Review

**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](#)



# Review of Purchase Request

- 1) Treasurer and their designated back-up will both get emails indicating that their Review is Requested for a Budget Request
- 2) Treasurer is expected to act unless unavailable and alerts their back-up to respond to requests for a certain timeframe
- 3) To review request, comments and uploaded PDF, simply click on the “button” within the email itself

Review requested for the budget request UCTV \$250 PCDO - Squarespace FY22

**From:** noreply@engage.mail.campuslabs.com <noreply@engage.mail.campuslabs.com> On Behalf Of UConn Contact <noreply@engage.mail.campuslabs.com>  
**Sent:** Wednesday, September 8, 2021 11:47:35 PM (UTC-05:00) Eastern Time (US & Canada)  
**To:** Miller, Kimberly <kimberly.miller@uconn.edu>  
**Subject:** Review requested for the budget request UCTV \$250 PCDO - Squarespace FY22

Your review has been requested for the budget request "UCTV \$250 PCDO - Squarespace FY22" submitted by Katelyn Desautels for the budget process FY22 Trustee Student Org Purchase Request (Trustee Org Funded ONLY).

You have been assigned to step TSOS Office Staff Review for this review process.

[Review Request](#)

# Org Signers Taking Action

Org Signer's Review confirms that the request is:

- a. complete
- b. accurate
- c. compliant with all policies and procedures
- d. reflective of the intent of the organization vote

If needs revision, use “Comments” to communicate questions or what is found to be missing and click “Return for Follow-up”

If, a-d are good, click “Forward to Next Step” which generates an email to the President and Back-up who follow the same steps to move to TSOS

Step: 2nd Officer Approval

→ FORWARD TO NEXT STEP    ↶ RETURN FOR FOLLOW-UP

Additional Reviewers  
Additional reviewers only apply to current step.    ADD REVIEWER

*No reviewers have been manually added to this step.*

Request History    ADD COMMENT

→ Moved Forward to: 2nd Officer Approval  
9/2/2020, 3:57PM by Fabio Saccomanno

Submitted  
8/24/2020, 2:52PM by Shelby Langevin

# TSOS Taking Action

Remember, for even the most basic request (office supplies), org review should be complete and moved to TSOS minimally a week prior to TSOS action being required. Advertising cannot occur before the PR is approved and if there are any complexities, a high dollar value or custom work being requested, more time will be required. The rule of thumb is that orgs should begin planning two months in advance and submit requests a month in advance.

TSOS handles requests in the order they are received and will not adjust our Workflows to address a time crunch of an org's own making

## Request History



Approved

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

Look at “Request History” for information on who has taken action

# Approval

- TSOS is the last step in the process and will “Approve” when 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
- Vendors/Enter Bill in Quickbooks for purchase
- Look in UCONNTACT in your org under Budget Requests to see the status of those in progress

# Questions

## Trustee Student Organization Support

**Ask first** and save time and energy!

Exclusively use TSOS shared mailbox to hear back the fastest from the right person:

[trusteeorgsupport@uconn.edu](mailto:trusteeorgsupport@uconn.edu)

Office 860-486-6461



# Thank you!