Trustee 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 purchasing method chart, 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, 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/
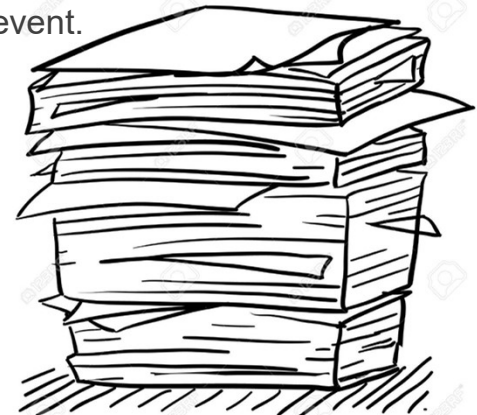
Pre-Purchase Documentation II

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

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.
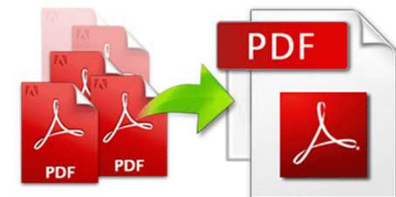
Titling the PDF

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)

Method	Use in PR Naming Convention	Appears on Monthly Bill
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

{We Can Code IT}

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
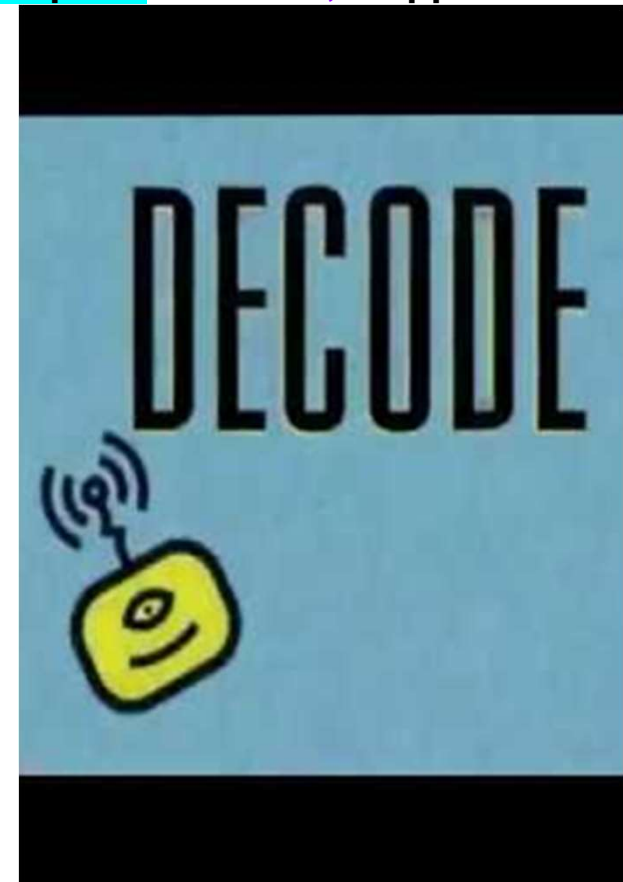
Preparing to Submit a PR

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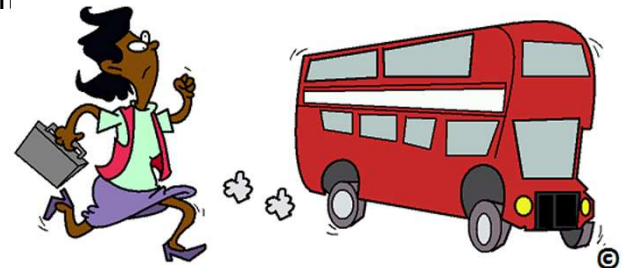
If an **EVENT** is involved, you will be asked for that information, date(s), time(s), space reservation and available advertising (flyer, email blast, social media posts) so have it at hand before you start

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.
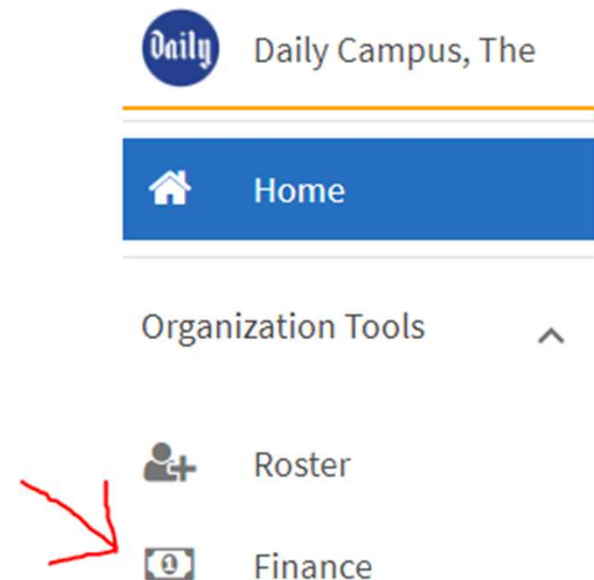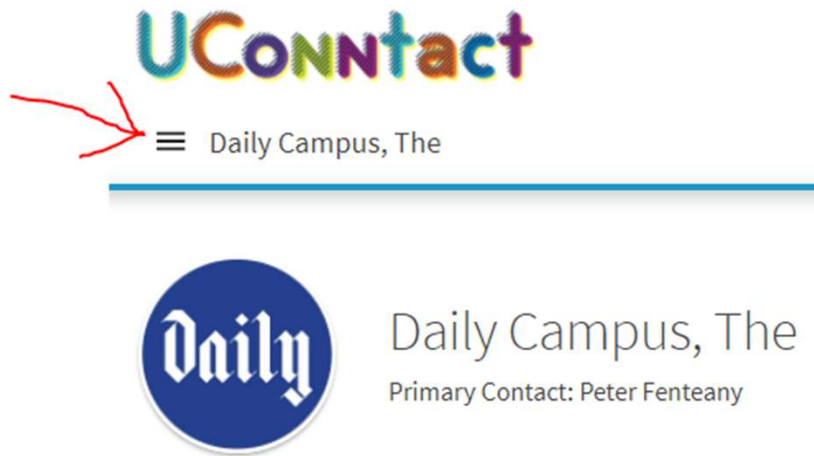
UCONNTACT Sign-on

1) Using your computer, navigate to uconntact.uconn.edu

2) Navigate to your Organization Page, eg Daily Campus
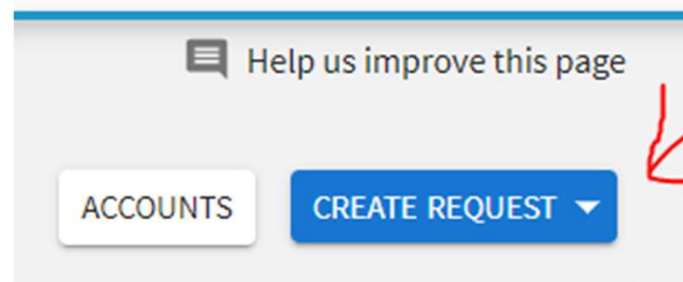
3) Choose Manage Organization on right
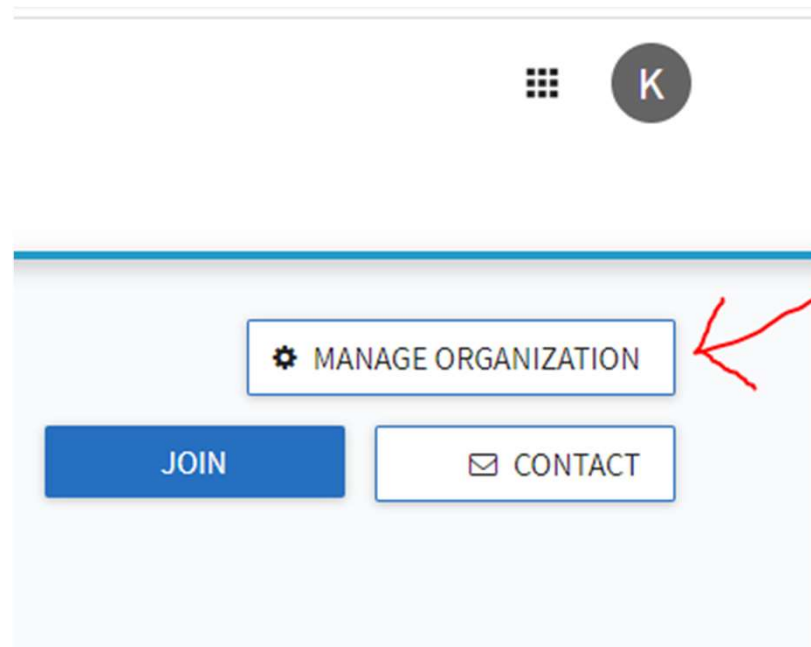
Getting to Finance

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:
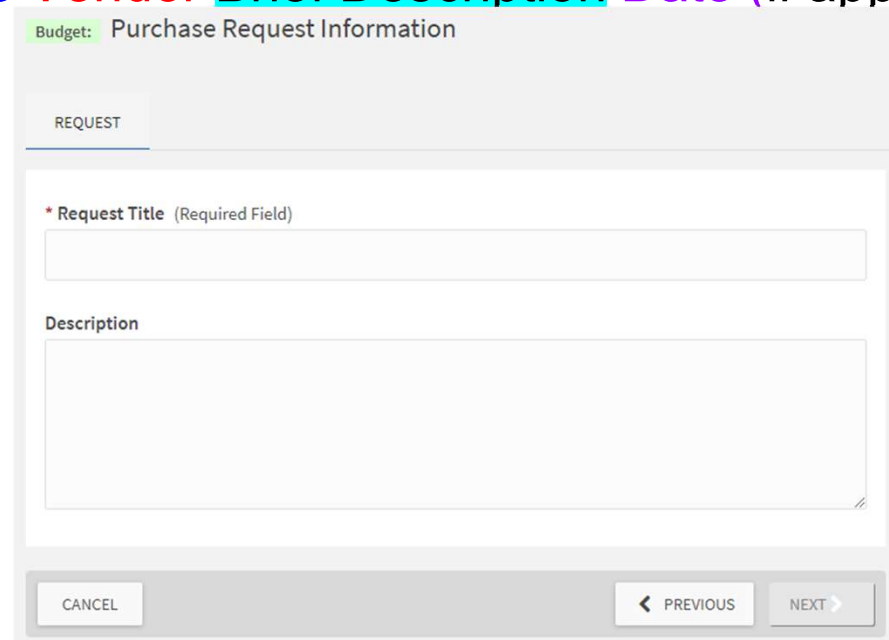
Trustee Student Org Purchase Request (Trustee Org Funded ONLY)

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:

Select Answer

Avery Point ASG (KFS# 3124330)

Daily Campus (KFS# 3124420)

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

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:

Select Answer

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

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" = 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

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   * Cost   Total

1   X $ =   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

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 OfUConntact <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

TSOS Taking Action

Remember, for even the most basic request, org review should be complete and moved to TSOS minimally a week prior to TSOS action being required. 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

- "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

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

Office 860-486-6461

Thank you!