

AGENCY CLUB ACCOUNT PURCHASING GUIDELINES

General Purchase Guidelines

1. All Agency Club Account purchases must follow the guidelines outlined in this document.
2. All Agency Club Account purchases must be pre-approved via Owl Central prior to doing business with a vendor.
3. All Agency Club Account purchases must be signed by two members of the club.
4. Purchase requests must be submitted to the Activity and Service, Accounting and Budget Office (ASAB), at least 7 business days prior to an event, with the exception of on campus food vendor purchases which must be submitted at least 5 business days prior to an event. Requests submitted outside of the provided timeline must include a non-routine justification signed by a Student Affairs and Enrollment Management (SAEM) representative; advisors will assist students with this step.
5. All purchases made in the State of Florida must be tax exempt.
6. With the exception of pcard purchases, only do business with vendors registered with FAU (Only professional staff have Pcards). Registered means the vendor is in the University's Finance system, Workday.
7. Purchases made for giveaways and prizes are subject to a \$100 maximum per item and a list of recipients must be provide to the Activity and Service, Accounting and Budget Office.
8. All printed and promotional item purchases must be made with vendors that are licensed and registered with FAU. Licensed means the vendor has permission from University to produce licensed FAU materials. Registered means the vendor is in the University's finance system, Workday.
9. With the exception of printed items from the on campus, Toshiba office, printed and promotional items cannot be made on pcard.
10. All purchases for performers, speakers, FAU employees who provide services and equipment rental must be accompanied with an executed contract signed by the vendor and FAU legal representation. It can take up to 2 months to obtain an executed contract. SAEM's contract process must be followed. No student or professional staff should sign a contract.
11. Except where food waivers/permits have been obtained, all catering purchases must be made with FAU's on campus food vendor, Chartwells. Davie Campus does not have Chartwells but must still have food permits.
12. All beverage purchases must be Coca Cola products.
13. All office supplies must be ordered from Office Depot.
14. Office supplies cannot be ordered from Amazon.
15. Food items requiring food waivers/permits cannot be purchased using a Pcard. Pre-packaged foods can be purchased on Pcard.
16. Funds used from an Agency Club Account cannot be used to purchase alcohol, firearms, drugs, weapons or used for political campaigns.
17. Agency Club Account purchases should not be personal in nature.
18. To be reimbursed for travel expenses, travel must be pre-approved via an Owl Central purchase requests prior to your trip.
19. For a club to be reimbursed for expense, the club must be a registered vendor with FAU.
20. Any alleged acts of fiscal irresponsibility must be reported to the ASAB Office.

Off Campus Food Vendor Purchase Request

To make a purchase with an off-campus food vendor, use the following steps to prepare your purchase request for submission to ASAB:

1. **Verify that your vendor is registered with FAU at least 30 days prior to your event**
Contact ASAB, asab@fau.edu, to verify that the vendor is registered with FAU. If your vendor is not registered ASAB will assist you with getting the vendor registered.
2. **Obtain Quote from Vendor**
3. **Obtain a Food Waiver and a permit from the Business Services Office**
Food Waivers and permits should be requested at least 17 business days before your event to allow enough time to submit your purchase request to ASAB. Business services requires at least 10 business days to process food waivers and permits. [Click here](#) to obtain a Food Wavier Application and [click here](#) to obtain a permit. (Only a permit is required for the Davie Campus)
4. **Obtain an approved event registration**
The event registration should be made at least 17 business days before your event. Event registration is done via your organization's or department Owl Central page.
5. **Submit your purchase request to ASAB**
Your purchase request must be submitted via Owl Central at least 7 business days prior to your event and must contain the following:
 1. Completed [Agency Club Account Expense Justification Form](#)
 2. Itemized Vendor Quote
 3. Approved Food Waiver/Permit
 4. Approved Event Registration
 5. [New Supplier Application](#) and [W9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information. If supplier is an individual, an [Independent Contractor Checklist](#) must be completed and signed by a professional staff in your department.
 6. [Non-routine Justification](#) form signed by a SAEM member, for those purchases being made outside the submission deadlines.
6. **ASAB will notify you regarding your approved purchase along with next steps to follow to complete your purchase request.**

On Campus Food Vendor Purchase Request

To make a purchase request with an on-campus food vendor, use the following steps to prepare your purchase request for submission to ASAB:

1. **Obtain Quote from Vendor**
At least 20 days prior to your event visit www.fau.catertrax.com to obtain a Chartwells quote.
2. **Obtain an approved event registration**
The event registration should be made at least 17 business days before your event. Event registration is done via your organization's or department Owl Central page.
3. **Submit your purchase request to ASAB**
Your purchase request must be submitted to ASAB via Owl Central at least 5 business days prior to your event and must contain the following:
 1. Completed [Agency Club Account Expense Justification Form](#)
 2. Itemized Vendor Quote with agreement #
 3. [Non-routine Justification](#) form signed by a SAEM member, for those purchases being made outside the submission deadlines.
4. **ASAB will notify you regarding your purchase along with steps to follow in order to complete your purchase request.**

Contractors-Performer, Speaker, FAU Employee who provides services, or Event Equipment Rental Purchase Request

A performer, speaker, FAU employee who provides services or event equipment rental purchase is used when you bring a performer, speaker, or artist to campus or you rent equipment such as staging or lighting for an event or use an FAU employee to provide services. Use the following steps to prepare your purchase request for submission to ASAB:

1. **Obtain Contract or MOU (for FAU Employees) Endorsed by FAU Purchasing**
You should obtain the contract at least **2 months prior** to your event. For more information on obtaining or submitting contracts to be endorsed by purchasing, student organizations and SG should contact their advisors; all others should visit the SAEM's contract webpage at <http://www.fau.edu/student/sa-contracts.php>. If a vendor is not a corporation or an LLC, in addition to the contract an Employee vs Independent Contractor Checklist must be completed and signed by the RSO or SG advisor, department advisor or director were applicable.
2. **Verify that your vendor is registered with FAU**
Contact ASAB, asab@fau.edu, to verify that the vendor is registered with FAU. If your vendor is not registered ASAB will assist you with getting the vendor registered.
3. **Obtain an approved event registration**
The event registration should be made the same time you begin the contract process for the event. Event registration is done via your organization's or department Owl Central page.

4. **Submit your purchase request to ASAB**

Your purchase request must be submitted to ASAB via Owl Central at least 7 business days prior to your event and must contain the following:

1. Completed **Agency Club Account Expense Justification Form**
 2. Approved Event Registration
 3. Contract endorsed or MOU by vendor and FAU legal
 4. **New Supplier Application** and **W9** for new vendors not currently registered with FAU or current vendors wishing to update their information. If supplier is an individual, an **Independent Contractor Checklist** must be completed and signed by a professional staff in your department.
 5. **Non-routine Justification** form signed by a SAEM member, for those purchases being made outside the submission deadlines.
5. **ASAB will notify you regarding your purchase along with steps to following in order to complete your purchase request.**

Printed Item or Promotional Item Purchase Request

Printed items are publications, flyers, posters, signage, and banners. Promotional items are giveaways such as cups, pens, and t-shirts. Use the following steps to prepare your purchase request for submission to ASAB:

1. **Obtain printed item approval only not promotional item. At least 45 days prior to your event, obtain approvals you may need as follows:**
 - o RSOs – send an email to involvement@fau.edu to obtain approval for printed items.
 - o SG – send an email to mahlerr@fau.edu to obtain approval for printed items.
 - o All Others – **submit a ticket** to SAEM Marketing to obtain approval printed items.

NOTE: Printed and promotional items must be made with vendors that are not only registered with FAU but that are also licensed. For a list of vendors, search key words Licensee by Client from the FAU homepage.

2. **Obtain quote**
At least **30 days prior** to your event, obtain a quote from a licensed vendor registered with FAU. (**NOTE:** If the purchase is not for an RSO or SG, obtain quote from SAEM Marketing).
3. **If for an event, obtain an approved event registration**
The event registration should be made at least 17 business days before your event. Event registration is done via your organization's or department Owl Central page.
4. **Submit your purchase request to ASAB**
Your purchase request must be submitted to ASAB via Owl Central at least 7 business days prior to your event and must contain the following:
5. Completed **Agency Club Account Expense Justification Form**
6. **Approved Event Registration (were applicable)**
7. **Itemized Vendor Quote**
8. **Approval for printed materials**
9. **Copy of markup**
10. **New Supplier Application** and **W9** for new vendors not currently registered with FAU or current vendors wishing to update their information.

If supplier is an individual, an **Independent Contractor Checklist** must be completed and signed by a professional staff in your department.

11. **Non-routine Justification** form signed by a SAEM member, for those purchases being made after the event has passed.
12. ASAB will notify you regarding your purchase, along with steps to follow in order to complete your purchase.

Online Purchase Request

Online purchases are used to make purchases online on a purchasing card, except where the pcard guidelines prohibit. Only professional staff can use their pcard to make these types of purchases. Use the following steps to prepare your purchase request for submission to ASAB:

PLEASE NOTE: Food (other than prepackaged snacks), promotional, publication, or printed items (other than Toshiba on campus) can NOT be ordered online or purchased via P-card. **Amazon and Office Depot orders must be submitted as general purchases.**

1. **Provide list of items to be purchased**
At least 20 days prior to your event, fill the shopping cart on the website in which you would like to make the purchase and print out the cart. The print-out must contain the name of the website on it, itemized cost, and a total.
2. **If for an event, obtain an approved event registration**
The event registration should be made at least 17 business days before your event. Event registration is done via your organization's or department Owl Central page.
3. **Submit your purchase request to ASAB**
Your purchase request must be submitted to the ASAB vial Owl Central at least 7 business days prior to your event and must contain the following:
4. **Completed Agency Club Account Expense Justification Form**
5. **Approved Event Registration were applicable**
6. **Copy of online shopping cart**
7. **Non-routine Justification** form signed by a SAEM member, for those purchases being made outside the submission deadlines.
8. ASAB will notify you regarding your approved purchase along with next steps to follow in order to complete your purchase request.

Technology Purchase Request

A technology purchase is the purchase of computers, software, etc. Use the following steps to prepare your purchase request for submission to ASAB:

1. **Obtain a quote from Student Affairs Information Technology**
Submit a ticket to Student Affairs Technology at the following link to request a quote for the items you wish to purchase: <http://www.fau.edu/student/technology/> (only a professional staff can submit a ticket).
2. **Submit your purchase request to ASAB**
Your purchase request must be submitted to ASAB via Owl Central and must contain the following:
3. **Completed Agency Club Account Expense Justification Form**
4. **Vendor Quote from SA Marketing**
5. **New Supplier Application** and **W9** for new vendors not currently registered with FAU or current vendors wishing to update their information.
If supplier is an individual, an **Independent Contractor Checklist** must be completed and signed by a professional staff in your department.
6. **Non-routine Justification** form signed by a SAEM member, for those purchases being made outside the submission deadlines.
7. ASAB will notify you regarding your purchase, along with steps to follow in order to complete your purchase.

On Campus Department Purchase Request

An on-campus department purchase request is used to pay or reimburse an on-campus department other than Toshiba and the campus bookstore. Toshiba can only be paid with a pcard and the bookstore via pcard or requisition; use the following steps to prepare your purchase request for submission to ASAB:

1. **Obtain Quote from Department**
At least **30 days prior** to your event, obtain a quote from the department providing the service or goods. For postage, obtain estimated cost at <https://postcalc.usps.com/>.
2. **If for an event, obtain an approved event registration** The event registration should be made at least 17 business days before your event. Event registration is done via your organization's or department's Owl Central page.
3. **Submit your purchase request to ASAB** Your purchase request **must** be submitted to the ASAB via Owl Central at least 7 business days prior to your event and must contain the following:
4. **Completed Agency Club Account Expense Justification Form**
5. **Department Quote**
6. **Approved Event Registration** were applicable.
7. **Non-routine Justification** form signed by a SAEM member, for those purchases being made outside the submission deadlines.
8. ASAB will notify you of regarding your purchase, along with steps to follow in order to complete your purchase.

FAU Trademark Business Cards or Name Badge

Purchase Request

Use the following steps below to prepare your purchase request for submission to ASAB for official FAU Trademarked business cards or name badges:

1. **Obtain Pricing** Pricing can be found on the ASAB Business Card Form. [Click here](#) to download a name badge form.
2. **Submit your purchase request to ASAB via Owl Central** Your purchase request *must* contain the following:
 1. Completed [Agency Club Account Expense Justification Form](#)
 2. Approved [business card proof](#) or [name badge](#) form
3. **ASAB will notify you regarding your purchase, along with steps to follow in order in to complete your purchase.**

General Merchandise, Amazon, Office Depot

Purchase Requests

General purchases are those purchases that do not fall in any of the above categories; also use these guidelines to make Amazon and Office Depot order. Use the following steps to prepare your purchase request for submission to ASAB:

1. **Verify that your vendor is registered with FAU**
At least 45 days prior to your event, contact ASAB, asab@fau.edu , to verify that the vendor is registered with FAU. If your vendor is not registered ASAB will assist you with getting your vendor registered.
2. **Obtain Quote from Vendor**
3. **If for an event, obtain an approved event registration**
The event registration should be made at least 17 business days before your event. Event registration is done via your organization or department Owl Central page.
4. **Submit your purchase request to ASAB**
Your purchase request must be submitted to the ASAB via Owl Central at least 7 business days prior to your event and must contain the following:
5. **Completed [Agency Club Account Expense Justification Form](#)**
6. **Itemized Vendor Quote**
7. **Approved Event Registration were applicable.**
8. **[New Supplier Application](#) and [W9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information.**
If supplier is an individual, an [Independent Contractor Checklist](#) must be completed and signed by a professional staff in your department.
9. **[Non-routine Justification](#) form signed by a SAEM member, for those purchases being made after the submission deadlines.**

10. ASAB will notify you of your approved purchase along with steps to following in order to complete your purchase request.

Travel Purchase Request

Use the following steps to submit pre-approval for Travel expenses:

1. **Gather your estimated trip cost to include but not limited to: Airfare, hotel, ground transportation, etc.**
Obtain this information at least 30 days prior to your trip
2. **Obtain approved Notification to Travel (includes waivers)**
At least 30 days prior to travel, if students are traveling, obtain an approved Notification to Travel at www.fau.edu/studenttravel
3. **Obtain copy of event agenda or proof of event**
4. **Submit your purchase request to ASAB**
Your purchase request must be submitted to the ASAB via Owl Central and must contain the following:
5. **Completed Agency Club Account Expense Justification Form**
6. **Copy of event agenda or proof of event.**
7. **Estimated Cost (if charter bus is being used, a copy of the executed contract)**
8. **Approved Notification to travel and waivers forms were applicable.**
9. **New Supplier Application** and **W9** for new vendors not currently registered with FAU or current vendors wishing to update their information.
If supplier is an individual, an **Independent Contractor Checklist** must be completed and signed by a professional staff in your department.
10. **Non-routine Justification** form signed by a SAEM member, for those purchases being made after the submission deadlines.
11. ASAB will notify you regarding you purchase, along with steps to follow in order to complete your purchase.

Club Reimbursement Purchase Request

A club reimbursement purchase request is used to reimburse a club for expenses. Use the following steps to prepare your purchase request for submission to ASAB:

1. **Submit your purchase request to ASAB** Your purchase request *must* be submitted to the ASAB via Owl Central at least 7 business days prior to your event and must contain the following:
2. **Completed Agency Club Account Expense Justification Form**
3. **Department Quote**
4. **Approved Event Registration were applicable.**
5. **Non-routine Justification** form signed by a SAEM member, for those purchases being made outside the submission deadlines.
6. ASAB will notify you of regarding your purchase, along with steps to follow in order to complete your purchase.