



ACTIVITY & SERVICE FEE PURCHASING GUIDELINES

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General Purchase Guidelines

1. In order to access A&S Funding, SG, A&S funded departments, programs and student organizations (RSO) approved for A&S fee funding, must send at least two Financial Officers to complete Fiscal Training.
2. All Activity and Service Fee (A&S) purchases must be pre-approved via Owl Central prior to doing business with a vendor.
3. Unless otherwise directed by the Vice President of Student Affairs and Enrollment Management (SAEM) or his/her designee, 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.
4. All purchases made in the State of Florida must be tax exempt.
5. With the exception of pcard purchases, only do business with vendors registered with FAU (Only professional staff have Pcards).
6. Unless prior permission is given for staff to be reimbursed, all purchases are made via Pcard, Blanket Purchase orders or via the University's Requisition/Purchase Order process.
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 promotional item purchases must be made with licensed vendors registered with FAU.
9. With the exception of printed items from the on campus, Toshiba office, printed and promotional items cannot be made on pcard.

General Purchase Guidelines Con't

10. All purchases for performers, speakers, 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 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. Food items requiring food waivers/permits cannot be purchased using a Pcard. Pre-packaged foods can be purchased on Pcard.
14. A&S Funds cannot be used to purchase food/refreshments for standing meetings.
15. A&S Funds cannot be used for fundraisers, gift cards, vouchers, cash awards or scholarships.
16. A&S Fees cannot be used to purchase alcohol, firearms, drugs, weapons or used for political campaigns.
17. A&S Fee purchases should not be personal in nature and should provide benefit to the general student body.
18. Staff travel must be pre-approved via spend authorization prior to trips. An Approved Expense Justification form (EJF) and supporting documentation must be attached to the Spend Authorization. Each person traveling must be named in a spend authorization.
19. Each professional staff traveling must complete his/her own Spend Authorization.

General Purchase Guidelines Con't

20. When students are traveling, an approved Notification to Travel, name and Z#s of each student and signed waivers for each student, must be attached to the EJV and spend authorization.

21. Expense reports related to pcard purchases must be submitted and approved in Workday within 30 calendar days of receiving notice to complete the tasks. (Due to fiscal year closing, due dates may change at the end of the fiscal year).

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.

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 [Expense Justification Form](#) (not required for RSOs)
2. Itemized Vendor Quote
3. Approved Food Waiver
4. Approved Event Registration
5. [New Supplier Application/Substitute W-9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information.
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 [Expense Justification Form](#) (not required for RSOs)
- 2) Itemized Vendor Quote with agreement #
- 3) Approved Event Registration
- 4) [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 or Event Equipment Rental Purchase Request

A performer, speaker 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. Use the following steps to prepare your purchase request for submission to ASAB:

1) Obtain Contract 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 contracts 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 [Expense Justification Form](#) (not required for RSOs)
- 2) Approved Event Registration
- 3) Contract endorsed by vendor and FAU legal
- 4) Employee vs Independent Contractor Checklist (were applicable)
- 5) [New Supplier Application/Substitute W-9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information.
- 6) [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, and posters. 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 Logo and/or Design

At least **45 days prior** to your event, obtain any logo and/ design approvals you may need:

- **RSO** – send an email to involvement@fau.edu to obtain approval for printed items and to obtain new logos for promotional items.
- **SG** – send an email to mahlerr@fau.edu to obtain approval for printed items.
- **All Others** – submit a [ticket](#) to SAEM Marketing to obtain approval to purchase printed and promotional items and a quote.

2) Obtain quote

At least **30 days prior** to your event, obtain a quote from a licensed vendor registered with FAU. Click the following for a list of vendors: <http://www.fau.edu/otlm/find-fau-products/Florida%20Atlantic%20University%20Licensees%20List.pdf> . (**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:

- 1) Completed [Expense Justification Form](#) (not required for RSOs)
- 2) Approved Event Registration (where applicable)
- 3) Itemized Vendor Quote
- 4) Approval for printed materials and promotional items (where applicable)
- 5) Copy of markup
- 6) [New Supplier Application/Substitute W-9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information.
- 7) [Non-routine Justification](#) from signed by a SAEM member, for those purchases being made after the event has passed.

5) 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 via P-card

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:

- 1) Completed [Expense Justification Form](#) (not required for RSOs)
- 2) Approved Event Registration were applicable
- 3) Copy of online shopping cart
- 4) [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 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:

1. Completed [Expense Justification Form](#) (not required for RSOs)
2. Vendor Quote from SA Marketing
3. [New Supplier Application/Substitute W-9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information.
4. [Non-routine Justification](#) form signed by a SAEM member, for those purchases being made outside the submission deadlines.

3) 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.

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:

- 1) Completed [Expense Justification Form](#) (not required for RSOs)
- 2) Department Quote
- 3) Approved Event Registration were applicable
- 4) [Non-routine Justification](#) form signed by a SAEM member, for those purchases being made outside the submission deadlines.

4) ASAB will notify you of regarding your purchase, along with steps to follow in order to complete your purchase.

FAU Trademark Business Cards, Stationary 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, stationary or name badges:

1) Obtain Pricing

[Click here](#) to obtain pricing for business cards and/or stationary and to download form for proof.

[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 [Expense Justification Form](#) (not required for RSOs)
- 2) Approved [business card](#), [stationary 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 Purchase Request

General purchases are those purchases that do not fall in any of the above categories; 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:

- 1) Completed [Expense Justification Form](#) (Not Required for RSOs)
- 2) Itemized Vendor Quote
- 3) Approved Event Registration were applicable
- 4) [New Supplier Application/Substitute W-9](#) for new vendors not currently registered with FAU or current vendors wishing to update their information.
- 5) [Non-routine Justification](#) form signed by a SAEM member, for those purchases being made after the submission deadlines.

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

Staff Travel Purchase Request

Use the following steps to submit pre-approval for Staff 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:

- 1) Completed [Expense Justification Form](#) (not required for RSOs)
- 2) Copy of event agenda or proof of event
- 3) Estimated Cost (if charter bus is being used, a copy of the executed contract)
- 4) Approved Notification to travel and waivers forms were applicable
- 5) [Non-routine Justification](#) form signed by a SAEM member, for those purchases being made after the submission deadlines.

- 5) ASAB will notify you regarding you purchase, along with steps to follow in order to complete your purchase.