



# **ACTIVITY & SERVICE FEE PURCHASING GUIDELINES**

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# General Purchase Guidelines

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1. All purchases must be pre-approved via Owl Central prior to creating any Workday business processes or pcard purchases.
2. Unless otherwise directed by the Vice President of Student Affairs and Enrollment Management (SAEM) or his/her designee, when the purchase is for an event, the purchase pre-approval requests must be submitted at least **7 days** prior to an event with the exception of existing blanket PO purchases which must be submitted at least **5 days** prior to an event.
3. All purchases made in the State of Florida must be tax exempt.
4. With the exception of pcard purchases, only do business with vendors registered with FAU.
5. 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.
6. 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 (ASAB).
7. All promotional item purchases must be made with licensed vendors registered with FAU.
8. 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

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9. All purchases for Performers 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 contract process must be followed. No student or professional staff is should sign a contract.
10. Except where food waivers have been obtained, all catering purchases must be made with Chartwells, FAUs contracted caterer. Davie Campus does not have Chartwells but must still have food permits.
11. All beverage purchases must be Coca Cola products.
12. Food items requiring food waivers/permits cannot be purchased using a Pcards.
13. A&S Funds cannot be used to purchase food/refreshments for standing meetings.
14. A&S Funds cannot be used to for fundraisers, gift cards, vouchers, cash award or scholarsihps.
15. A&S Fees cannot be used to purchase Alcohol, firearms, drugs, weapons or used for political campaigns
16. A&S Fee purchases should not be personal in nature and provide benefit to the general student body.
17. Travel must be pre-approved via spend authorization at least **5 days** prior to trips. An Owl Central approved Pre-Approval and supporting documentation must be attached to the Spend Authorization. Each person traveling must be named in a spend authorization.
18. Each professional staff traveling that is expecting reimbursement must complete his/her own Spend Authorization.

# General Purchase Guidelines Con't

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19. When students are traveling, an approved notification to travel, name and Z#s of each student, signed waivers, and signed photo releases for each student, must be attached to the spend authorization.
20. Expense reports related to pcard purchases must be submitted and approved in Workday within 30 calendar days. (Due to fiscal year closing, due dates may change at the end of the fiscal year).

# Completing Food Purchase Request (not on Blanket PO or non Chartwells vendors)

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A food purchase is for food purchases that are not associated with an existing Chartwells blanket purchase order or for vendors other than Chartwells. Check with ASAB to see if your department has a blanket purchase order with Chartwells. Use the following steps to prepare your purchase pre-approval 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](mailto: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 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](#)
2. Itemized Vendor Quote
3. Approved Food Waiver
4. Approved Event Registration

**6) ASAB will notify you of your approved purchase along with next steps to follow to complete your purchase request.**

# Existing Chartwells Blanket Purchase Order Purchase Request

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A Chartwells purchase order allows you to easily make food purchases on campus without creating documents in Workday. Check with ASAB to see if your department has a blanket purchase order with Chartwells, use the following steps to prepare your purchase pre-approval for submission to ASAB:

**1) Obtain Quote from Vendor**

At least **20 days prior** to your event visit [www.fau.catertrax.com](http://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 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](#)
- 2) Itemized Vendor Quote with agreement #
- 3) Approved Event Registration

**4) ASAB will notify you of your approved purchase along with steps to follow in order to complete your purchase request.**

# Performer or Event Equipment Rental Purchase Request

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A performer 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 pre-approval 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 should contact the COSO advisor; all others should visit the SAEM contracts webpage at <http://www.fau.edu/student/sa-contracts.php> . If vendor is not a corporation or an LLC in addition to the contract an Employee vs Independent Contractor Checklist must be completed.

**2) Verify that your vendor is registered with FAU**

Contact ASAB, [asab@fau.edu](mailto: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 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](#)
- 2) Approved Event Registration
- 3) Contract endorsed by vendor and FAU legal
- 4) Employee vs Independent Contractor Checklist were applicable

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

# Printed Item or Promotional Item

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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 pre-approval 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](mailto: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](mailto: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.

## 2) Obtain quote from Student Affairs Marketing Services

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

## 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 ASAB via Owl Central at least **7 business days** prior to your event and **must** contain the following:

- 1) Completed [Expense Justification Form](#)
- 2) Approved Event Registration were applicable
- 3) Itemized Vendor Quote
- 4) Approval for printed materials and promotional items where applicable
- 5) Copy of markup

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

# Purchase Card Purchase Request

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Pcard purchases are used to make any purchase except where the pcard guidelines prohibit. Use the following steps to prepare your purchase pre-approval 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.

**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 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](#)
- 2) Approved Event Registration were applicable
- 3) Printed out of shopping cart

**4) ASAB will notify you of your approved purchase along with next steps to follow in order to complete your purchase request.**

# Technology Purchase Request

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A technology purchase is the purchase of computers, software, etc. Use the guidelines below to make this type of purchase:

**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/> .

**2) Submit your purchase request to ASAB**

Your purchase request *must* be submitted to ASAB via Owl Central *must* contain the following:

1. Completed [Expense Justification Form](#)
2. Vendor Quote from SA Marketing

**3) ASAB will notify you of your approved purchase, along with steps to follow in order to complete your purchase**

# On Campus Department Purchase Request

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An on campus department purchase request is used to pay or reimburse an on campus departments other than Toshiba and the campus bookstore. Toshiba and the bookstore can only be paid with a pcard; use the steps below to make an On Campus Department purchase request:

**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 or department 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](#)
- 2) Department Quote
- 3) Approved Event Registration were applicable

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

# FAU Trademark Business Card, Stationary or Name Badge Purchase Request

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Use the following steps below to purchase official FAU Trademarked business cards, stationary or name badges:

**1) Obtain Pricing**

[Click here](#) to obtain pricing for business cards and 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](#)

2) Business card or stationary proof or name badge form

**3) ASAB will notify you of your approved purchase, along with steps to follow in order in to complete your purchase.**

# Office Depot/Staples Purchase Request

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Use the process below to purchase supplies from Office Depot and Staples

**1) Obtain an Office Depot/Staples Shopping Cart.**

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.

**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 or department Owl Central page.

**3) Submit your purchase request to ASAB via Owl Central**

Your purchase request ***must*** contain the following:

- 1) Completed [Expense Justification Form](#)
- 2) Approved Event Registration were applicable
- 3) Printed out of shopping cart

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

# General Purchase Request

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General purchases are those purchases that do not fall in any of the above categories; use the following guidelines to make this type of purchase:

**1) Verify that your vendor is registered with FAU**

At least **45 days prior** to your event, contact ASAB, [asab@fau.edu](mailto: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](#)**

**2) Itemized Vendor Quote**

**3) Approved Event Registration were applicable**

**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

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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 and photo release forms)

At least 30 days prior to travel, if students are accompanying you on the trip, obtain an approved Notification to Travel at [www.fau.edu/studenttravel](http://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](#)
- 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, waivers, and photo release forms were applicable

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