

AGENCY CLUB ACCOUNT PURCHSING

GUIDELINES

Select a Topic:

General Purchase Guidelines
Off Campus Food Vendor Purchase Request
On Campus Food Vendor Purchase Request
Contractors -Performer, Speaker or Event Equipment Rental Purchase Request
Printed Items, Promotional Items Purchase Request
Online Purchase Request
Technology Purchase Request
On Campus Department Purchase Request
FAU Trademark Business Cards or Name Badge Purchase Request
General Merchandise, Amazon, Office Depot Purchase Requests
Travel Purchase Request
Club Reimbursement Purchase Request

General Purchase Guidelines

Back to Top

1. All Agency Club Account purchases must follow the guidelines outlined in this document.
2. All Agency Club Account purchases must abide by FAU policies and procedures.
3. All Agency Club Account purchase requests must be submitted via Owl.
4. All Agency Club Account purchases must be signed by two members of the club.
5. To allow processing time, with the exception of a reimbursement request, all purchase requests related to an event must be submitted to the Activity and Service, Accounting and Budget Office (ASAB) as follows:

    - at least 7 business days prior to an event, where the vendor is not an on-campus food vendor
    - at least 5 business days prior to an event, where the vendor is an on-campus food vendor

    Requests submitted outside of the provided timeline may not be processed in time for your event and requests made on the day of or after event has passed will require a non-routine justification

6. Purchase requests related to an on-campus event require an approved event registration.
7. All purchases made in the State of Florida must be tax exempt.
8. With the exception of pcard purchases and reimbursements, 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.
9. 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.
10. With the exception of printed items from the on campus, Toshiba office, printed and promotional items cannot be made on pcard but can be reimbursed.
11. 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.
12. Except where food waivers/permits have been obtained, all catering purchases for on campus events must be made with FAU's on campus food vendor, Chartwells. Davie Campus does not have Chartwells but must still have food permits.
13. All beverage purchases must be Coca Cola products for on campus events.
14. All office supplies must be ordered from Office Depot.
15. Office supplies cannot be ordered from Amazon except where the request is for a reimbursement.
16. Food items requiring food waivers/permits cannot be purchased using a Pcard. Pre-packaged foods can be purchased on Pcard.
17. Funds used from an Agency Club Account cannot be used to purchase alcohol, firearms, drugs, weapons.
18. For a club to be reimbursed for expense, the club must be a registered vendor with FAU.

Off Campus Food Vendor Purchase Request

Back to Top

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) **For on campus events, 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) **For on campus events, 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 where applicable**
   5. **For a New Supplier include the following with your request:**

      - Complete the New Supplier Application (required)
      - IRS W-9 Form (required)
      - Independent Contractor Checklist applicable to Individuals or Sole Proprietors only (required)
      - Business status from business home state Division of Corporation (required)
      - Current local business tax document (required)
      - Small/minority/women-owned business certification, if applicable

6) Non-routine Justification **form signed by requester as Department, for those requests being made on the day of the event or after the event.**

On Campus Food Vendor Purchase Request

Back to Top

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 **https://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) **Approved Event Registration**
   4) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event**

Contractors-Performer, Speaker or Event Equipment Rental Purchase Request

Back to Top

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'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) **For on campus events, 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 (**were applicable**)**
   3) **Contract endorsed by vendor and FAU legal**
   4) **Employee vs Independent Contractor Checklist (**were applicable**)**
   5) **For a New Supplier include the following with your request:**

      - Complete the New Supplier Application (required)
      - IRS W-9 Form (required)
      - Independent Contractor Checklist applicable to Individuals or Sole Proprietors only (required)
      - Business status from business home state Division of Corporation (required)
      - Current local business tax document (required)
      - Small/minority/women-owned business certification, if applicable

   6) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event.**

Printed Item or Promotional Item Purchase Request

Back to Top

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 printed item approval.**

At least **45 days prior** to your event, obtain approvals you may need as follows:

- **RSOs –** send an email to involvement@fau.edu to obtain approval for printed 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 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 on campus 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 Agency Club Account Expense Justification Form
    2) **Approved Event Registration (were applicable)**
    3) **Itemized Vendor Quote**
    4) **Approval for printed materials**
    5) **Copy of markup**
    6) **For a New Supplier include the following with your request:**

        - Complete the New Supplier Application (required)
        - IRS W-9 Form (required)
        - Independent Contractor Checklist applicable to Individuals or Sole Proprietors only (required)
        - Business status from business home state Division of Corporation (required)
        - Current local business tax document (required)
        - Small/minority/women-owned business certification, if applicable

    7) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event.**

Online Purchase Request

Back to Top

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 on campus 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 Agency Club Account Expense Justification Form
   2) **Approved Event Registration were applicable**
   3) **Copy of online shopping cart**
   4) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event.**

Technology Purchase Request

Back to Top

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 Agency Club Account Expense Justification Form
   2) **Vendor Quote from SA Marketing**

On Campus Department Purchase Request

Back to Top

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 on campus 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 Agency Club Account Expense Justification Form
    2) Department Quote
    3) Approved Event Registration were applicable
    4) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event.**

FAU Trademark Business Cards or Name Badge Purchase Request

Back to Top

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**

General Merchandise, Amazon, Office Depot Purchase Requests

Back to Top

General purchases are those purchases that do not fall in any of the above categories; Use this 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 on-campus 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 Agency Club Account Expense Justification Form
   2) Itemized Vendor Quote
   3) Approved Event Registration were applicable
   4) For a New Supplier include the following with your request:

      - Complete the New Supplier Application (required)
      - IRS W-9 Form (required)
      - Independent Contractor Checklist applicable to Individuals or Sole Proprietors only (required)
      - Business status from business home state Division of Corporation (required)
      - Current local business tax document (required)
      - Small/minority/women-owned business certification, if applicable

   5) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event.**

Travel Purchase Request

Back to Top

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 Agency Club Account 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 and waivers forms were applicable**
   5) Non-routine Justification **form signed by requester as Department, for requests being made on the day of or after an event.**

Club Reimbursement Purchase Request

Back to Top

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 and must contain the following:

    1) Completed Agency Club Account Expense Justification Form
    2) Invoice from club to FAU
    3) Itemized receipts supporting the detail on the invoice
    4) For club that is not a vendor with FAU, include the following with your request:

        - Complete the New Supplier Application (required)
        - IRS W-9 Form (required)
        - Independent Contractor Checklist applicable to Individuals or Sole Proprietors only (required)
        - Business status from business home state Division of Corporation (required)
        - Current local business tax document (required)
        - Small/minority/women-owned business certification, if applicable