

Trustee Student Org Purchase Request (Trustee Org Funded ONLY)

Purchase Request Information

This will be the option selected most of the time. The only time you will not use this form is if you are requesting a check. Below is an outline of each header and the questions asked. **Items in red** are required on the form.

Request/Submitter

- **Request Title:** Try to match with the reason for your request. Ex: SGA Halloween Food
- **Description:** Describe the reason you are making the request

Request Information

- **Choose the Organization....:** Select Stamford SGA (KFS# 3124350)
- **Indicate Committee....:** Enter the area you focus on (Novelty Program Director, Marketing Coordinator, etc.) or your Tier II RSO Name
- **This purchase request will ultimately....:** **PSA, BPO, PCDO** and **HBNC** are the most common ones we use at Stamford. See explanations below:

Code	Description	Example & Bill Statment
UNIV – Service/Product from University Department	Use when ordering something from another university department. You’re sending money to another departments KFS#	University catering, University document production CLTR, IB, SB on Monthly Bill
HBCO – University Contract	Use when the product or service falls under a University Contract. <i>If you’re not sure that we have a contract with the company you’re using, check:</i> https://purchasing.ubs.uconn.edu/university-of-connecticut-contracts	Promotional Items, Novelty Companies PREQ on Monthly Bill Use SOW for personal services
HBCA – HuskyBuy Catalog	Use when the services are available through the HuskyBuy Catalog. If you’re not sure, you can check the catalog: https://purchasing.ubs.uconn.edu/huskybuy/ . You’ll need to login with your NetID & Password. <i>Hint:</i> The catalog supplies show up on the home page with their logos.	<u>Office supplies:</u> WB Mason; <u>Technology supplies:</u> GovConnection, Apple, Dell, CDW-G, Anixter Inc PREQ on Monthly Bill
PSA – HuskyBuy Personal Service Agreement	Use when a Personal Service Agreement (PSA) is required to solidify all the relevant details. It MUST be used if the expense is over \$1,000. It is optional (but strongly suggested) if the expense is less than \$1,000 <i>You may need to set-up the vendor in HuskyBuy (Student Activities can help with this process)</i>	Performer, Speaker, Entertainer, Coach PREQ on Monthly Bill
BPO – HuskyBuy Non-Catalog Blanket	Multiple purchases OR purchasing multiple similar items from a product or service is available from a vendor in HuskyBuy but not a part of the catalog. *To check the catalog, log in with your NetID: https://purchasing.ubs.uconn.edu/huskybuy/ . *You may need to set-up the vendor in HuskyBuy (Student Activities can help with this process)	Supplies, service providers, local restaurants and stores that you may have had to invite to be a university vendor and you received quotes directly PREQ on Monthly Bill

Code	Description	Example & Bill Statement
HBNC – HuskyBuy Non-Catalog Purchase	<p>One-time purchase from a product or service is available from a vendor in HuskyBuy but not a part of the catalog</p> <p>*To check the catalog, log in with your NetID: https://purchasing.ubs.uconn.edu/huskybuy/.</p> <p>*You may need to set-up the vendor in HuskyBuy (Student Activities can help with this process)</p> <p><i>Hint: Difference between HuskyBuy Non-Catalog Purchase vs Blanket is one-time use (purchase) vs. multiple identical/similar purchases (blanket). Think of it like a blanket statement, the term implies it covers a lot or it is generalized.</i></p>	<p>Supplies, service providers, local restaurants and stores that you may have had to invite to be a university vendor and you received quotes directly.</p> <p>PREQ on Monthly Bill</p>
PCDO – ProCard	<p>ProCard is another term for Credit Card. Use for one-time small purchases for products or refreshments. Purchase must be less than \$5,000 and adhere to ProCard policies: https://purchasing.ubs.uconn.edu/category/procurement-services/procard</p>	<p>Amazon, Target, etc.</p> <p>* should only be done if HuskyBuy options have been exhausted</p> <p>PCDO on Monthly Bill</p>
TRAV – Travel Request	<p>Use for travel request for T3 members must also be completed via Concur. Used for attending events such as conferences, workshops, etc. Not for field trips/activities</p>	<p>Airfare, lodging, mileage, ground travel, meals, etc</p> <p>PCDO on Monthly Bill.</p>
REIM – Org Check Issued	<p>Use when your organization is writing a check to <u>reimburse</u>. Use this option minimally and as a last resort. If you need to write a check in advance, use the Check Request Process (different form)</p>	<p>Student purchases refreshments for a highly specialized diet, emergency supplies</p> <p>PREQ on Monthly Bill</p>
TBD – Unknown to the Submitter	<p>Use if you are not sure which option from above to select. A staff member will ensure the correct category has been selected</p>	

- **By submitting/approving...:** Read the text **carefully** and then select Yes
 - **Note:** If you're using HBCO, HBCA, PSA or HBNC (anything with HuskyBuy), you'll need to also adhere to the following:
 - **< \$5K:** Keep all quotes as you may be required to produce them
 - **\$5K - \$9,999.99:** You need 3 quotes or the Sole Source Form must be submitted with the purchasing form
 - **\$10K-\$49,999.99:** University Procurement may require a RFP
 - **\$50K+ :** University Procurement may require a formal bid
- **Who is/are the target audience...:** Identify your target audience according to the definitions below
 - **The entire student population:** The event is open to all students regardless of membership. SGA may exclude non-fee paying students. AKA students who do not pay an activities fee
 - **Or organization/members:** The event is only for members of your organization. For SGA this means only members listed on the SGA roster
 - **Tier II organization:** any Tier II organization should select this
 - **Other:** An individual or a Tier I organization
- **Justification and Business Purpose:** provide a description justifying why the purchase will benefit your audience
- **Vendor Information:** provide your vendor information if you have it
- **As the purchase is executed:** complete if you can
- **Additional Information:** provide any relevant information regarding your purchase
- **Is this purchase request...:** Yes/no pending relationship to an event

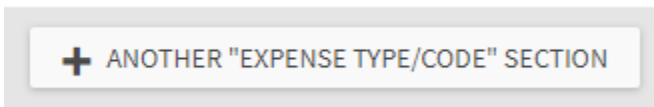
Stamford Tier-II Org Name

- **Organization Name:** All organizations regardless of Tier status are listed alphabetically.
- **Officer Position:**

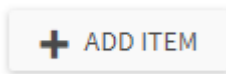
Event Information

- **Event Name**
- **Description of Event**
- **Event Location:** You will need your event registration confirmation. Remember, this is just confirming that you have submitted the event confirmation request. It does not mean you need to have your event fully confirmed to complete this purchase request form
- **Event/Activity Start Date**
- **Event/Activity Start Time**
- **Event/Activity End Date**
- **Event/Activity End Time**
- **Marketing/Advertising Attestation:** read carefully and select Yes

Requested Total



Select "+ Another Expense Type/Code Section" to add a NEW line item category. Think of this as adding subjects or headers to your shopping list. Ex: Fruit, Vegetables, Office Supplies. The items



Select "+ Add Item" for EACH item that falls under ONE category. Think of this as the items that fall under each header/subject on your shopping list. Ex: Your header is Fruit, so you might have grapes, strawberries, apples as individual items. You would select "+ Add Item" for each piece of fruit that you're adding

- **Line Item Category:** See chart below
- **Name:** Item title (assorted chocolate, Artist name, etc.)
- **Description:** Describe the item (variety of hershey's miniature chocolate including original, krackle & mr. goodbar; PSA Agreement to include performance by JayZ including equipment, entourage, meals, airfare)
- **Quantity**
- **Cost**
- **Support Document:** Items may include meeting minutes authorizing the purchase, travel schedule, game schedule, off-campus activity advising form, map of destination, Tier II roster, space reservation, etc.

Line Item Category Chart

No.	Title	Description	Example
602	Dues	Payment by your organization for membership.	National Organization or refunding a member
603	Gifts	Payment to purchase something for a member where the member was not charged and there was no winner.	Flowers, gift card, apparel or graduation stoles
604	Photocopying	Payment for photocopying only of original material provided by the organization, not printing (see below)	Copies of a flyer your member made at Staples or Document Production
605	Postage/ Shipping	Payment for outgoing postage or shipping, shipping from the organization to others	Stamps, UPS, FedEx, DHL for shipping from your organization to others
606	Printing	Payment for production of original printed material, not photocopying (see above)	Professional brochures, magazines, posters, business cards or letterhead
607	Promotional Items	Payment for general public giveaways of branded materials that are not for advertising or resale and includes tax and shipping to the organization	Branded t-shirts, water bottles, lanyards or stickers to give away to people outside the org
608.1	Refreshments – Org Member Only	Payment for refreshments restricted to members of an org for a regular org meeting or workshop	Food, beverages, candy, meals, ice cream, soda, water, pizza, catering for an org meeting
608.2	Refreshments – Org Events/Programs	Payment for refreshments specifically for an org event or program often including people outside of the org	Food, beverages, candy, meals, ice cream, soda, water, pizza, catering for an event
609	Subscriptions	Payment for material received, or access to material for a specific amount of time	Magazines, periodicals, newspapers, online accounts which includes access to software for a specific term
610.1	Supplies/ Materials – Organization	Paper, pens, folders, cleaning supplies, custodial items, paper goods, plastic cutlery	Paper, pens, folders, cleaning supplies, custodial items, paper goods, plastic cutlery
610.2	Supplies/ Materials – Events/Programs	Payment for supplies/materials, including tax/shipping for a specific event or program; anticipated to be used up within a year, not appropriate for inventory	Decorations, paper plates and cups, plastic cutlery for a special event or program
612	Advertising	Payment for an advertising or marketing services	Newspaper, magazine, radio, bus, yearbook, table tents or program advertising
613	Awards and Prizes	Payment for an award or prize where a winner results from a drawing or selection process	Scholarships, door prizes, gift cards, trophies
615.1	Contractual Services – Organization	Payment for a service provided to the organization in general, by a person or vendor by agreement	Custodial services, web hosting, equipment maintenance for the organization in general
615.2	Contractual Services – Events/Programs	Payment for a service provided for an organization event/program, by a person or vendor by agreement	DJ, band, referees, police, security, honorariums, speaker, service contracts for an event or program
617.1	Sales Expense – Cost of Food Sold	Payment for refreshments sold including tax and shipping to the org	Bottled water, candy, donuts, cookies, brownies, cupcakes

No.	Title	Description	Example
617.2	Sales Expense – Cost of Merchandise Sold	Payment for items or merchandise sold including tax and shipping to the org,	Clothes, t-shirts, buttons, stickers, flowers, CDs, jewelry, posters
617.3	Sales Expense – Cost of Participation	Expense for participation for which the group is charging	Non-contractual program expenses: bowling, movie tickets
617.4	Cost of Services Sold	Expense for services rendered for which the group is charging	Car wash, dog wash, service auction, henna, clean-up and set-up
622.1	Registration Fees	Payment to register the group or individual	Conference, sporting event, convention, competition, clinic, leadership training & development
622.2	Entry Fees	Payment for group or individual entry fee where no payment was collected from org member	Admission to a museum, movie theater, bowling alley
623	Rental	Payment for rental for org	Equipment, facilities, halls
624	Travel	Payment for travel of group or members	Airfare, taxi, parking, gas, tolls, mileage, hotels, trip meal reimbursements, bus rentals, internet expense while travelling
625	Equipment/ Durable Goods	Payment for items each under \$1,000 whose life expectancy exceeds a year, must include in controllable inventory	Physical software CD, electronics, banners
626	Equipment Capital	Payment for items each over \$1,000 whose life expectancy exceeds a year, must include in reportable inventory	Physical software CD, electronics, banners
627	Insurance	Payment for insurance coverage	Coverage for building, tower, vehicle, events liability
628	Repairs and Maintenance	Payment for repairs and maintenance only for fixed assets	Building roof, plumbing, electrical
640	Business Taxes	Payment made by the University or Tier III Org only for business tax	Performance tax, sales tax, unrelated business income tax