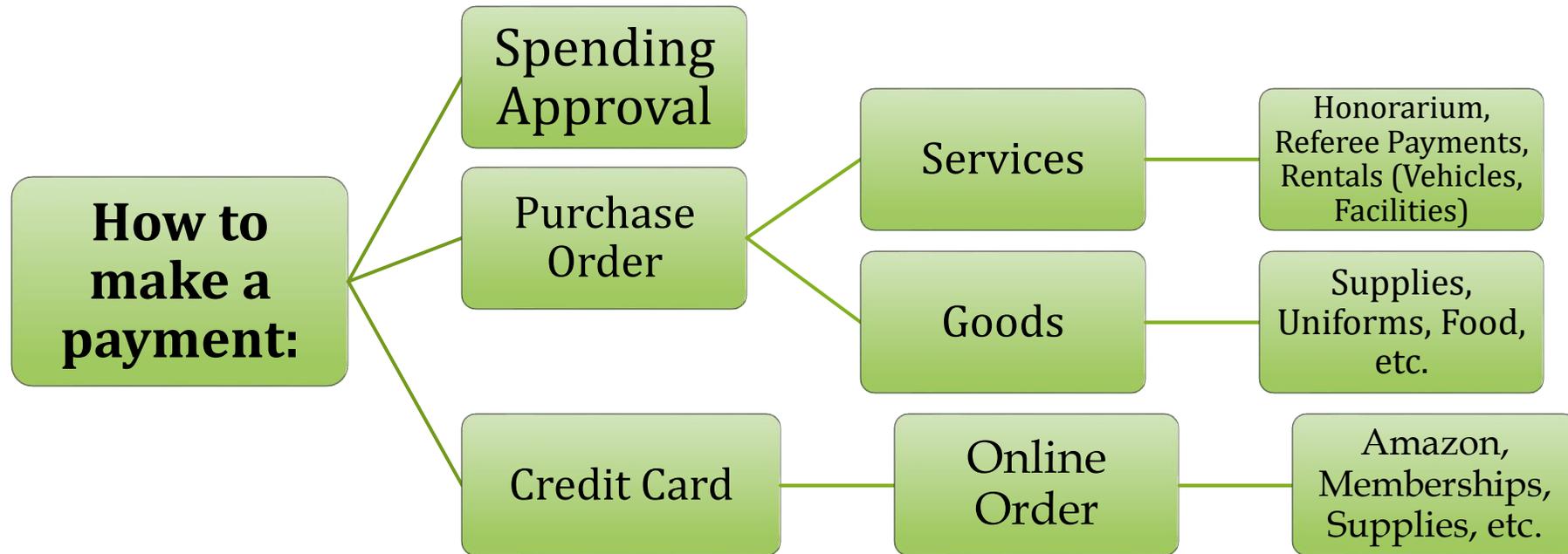




How to Make a Purchase

Sam Wigon, SGA Treasurer
The SGA Finance Office

Purchase Flow Chart



You must obtain spending approval from the SGA Business Office before making any purchases or making agreements/arrangements with vendors.

Spending Overview

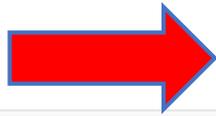
- Spending has been condensed into a one step process that you will complete online on the UVMClubs page.
 - FY'23 SGA Spending Request Form
- You must obtain spending approval from the SGA Finance Office before making any purchases or making agreements/arrangements with vendors.
- Only clubsigners will be authorized to make purchases or submit spending requests on their club's behalf.

Step One:

- All spending on behalf of an SGA recognized student organization must obtain spending approval. This is granted by submitting a spending request form on the UVMClubs page.
- Spending request forms must be filled out only by clubsigners.
- Spending Request will be reviewed by the Business Office every Tuesday and Thursday. You will receive notification of approval or denial of your request by Wednesday and Friday, respectively.
 - Please note that the Business Office is managing requests for over 200 SGA clubs and organizations, so there maybe delays in reviewing these requests some weeks. This also means to plan accordingly.
- You can locate the Spending Request Form on UVMClubs on the Business Office Page under form.

Spending Request Form

- What information you will need to fill out on the form:
 - Whether it is a credit card or purchase order
 - The supplier or vendor they plan on purchasing goods/services from
 - The type of purchase they are making (i.e. purchase of goods, rentals, registrations, annual event, etc.)
 - The amount or price range of the purchase.
 - The source of funds for the purchase (i.e., Budgeted Fund (130), Fundraised Fund (131), or Gift Fund (311))
 - Any other context about the purchase.
- Upon approval of this form, you will be given directions to move on to the next steps.
 - This could include the Business Office reaching out for extra items that need to be provided for a purchase or clarification on certain purchases.



Explore University of Vermont

SGA Purchase Portal (Formerly UTIX)

All clubs accepting payments for dues, fees, and memberships should fill out [THIS](#) form.

Step 1: SGA Spending Request Form

If you are looking to make a purchase, please complete a [Step 1: SGA Spending Request Form](#).

FA22 - SP23 ClubSigner & Advisor...

If your RSO needs to change over your ClubSigner for the upcoming academic year, please complete the [FA22 - SP23 ClubSigner & Advisor Changeover Form](#).

Memberships



Finance and Investment Club



Hillel



Outing Club



SGA Business Office



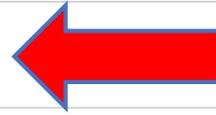
SGA Senate- Finance Committee



UVM Roundnet



FY'23 SGA Spending Request Form



EVENTS

All Events >



Postcard Printing with Gelli Plates

Wed, Aug 31, 2022, 6:00 PM to 8:00:00 PM EDT | Sugar Maple Ballroom

ORGANIZATIONS

No Results

All Organizations >

NEWS

All News >



FY2021 Budget Request Information

Fri, Dec 13, 2019, 12:05 PM EST



Request Organization Workshops Today!

Mon, Sep 19, 2016, 2:01 PM EDT



Planning Successful Events on Campus

Tue, Nov 5, 2019, 12:45 PM EST

FORMS

All Forms >



FY'23 SGA Spending Request Form

SGA Business Office - Sun, Jul 17, 2022, 12:00 PM EDT



SGA Purchase Portal (Formerly)

All clubs accepting payments for dues and memberships should fill out [T](#)

Memberships



Finance and Investment Club



SGA Business Office

ClubSigner & Advisor...

needs to change over your for the upcoming academic year, please complete the [FA22 - SP23 ClubSigner & Signageover Form](#).

ing Club

M Roundnet



FY'23 SGA Spending Request Form

Instructions

PLEASE READ ALL INFORMATION CAREFULLY

This form for all FY'23 spending requests including Purchase Orders, Credit Card purchases, and Gas Cards.

This spending request can be submitted as soon as you know you will need to spend money using your club's funds. Provide as much information and supporting documentation (quotes, travel approval or event dates, etc.) as you have at the time of submission.

We will inform you directly on the form if your request is approved or denied and what additional information/documents (if applicable) is needed.

For all **Purchase Orders**, a quote is needed from the vendor/supplier and a recent (less than 3 years old) W9 is required. Some requests may require additional information; if additional documents are needed, the Business Office will indicate this on the form after your submission is reviewed.

For **Credit Card** purchases and **Gas Card** use, an appointment must be made after spending approval to pick up the card(s). Information on how to do this will be communicated to you on your request form.

Requests are reviewed weekly, and the deadline to submit them is **TUESDAY AT 4:30PM**. As a reminder, the processing time for Purchase Orders is 5-6 weeks and for Credit Cards 2-3 weeks.

If this purchase is associated with a program/event, please ensure you create/d an event submission for review.

For questions, please email sga.finance@uvm.edu

NEXT



FY'23 SGA Spending Request Form

RSO Information

* Club or Organization Name

* Club Source Number (80XXXX)

* ClubSigner Name

* ClubSigner UVM Email

PREVIOUS

NEXT

FY'23 SGA Spending Request Form

Request Information

* Spending Request Type

- Credit Card - *confirm vendor/supplier accepts credit cards*
- Gas Card
- Purchase Order
- Print & Mail/Bookstore Orange Card

* Vendor/Supplier

* Product/Service Description (You must provide information for all bullet points listed for your "Type of Purchase.")

Type of Purchase	Information Needed in Description
Purchase of Goods	<ul style="list-style-type: none"> • Quantity • Description • Product number, if applicable • For any embroidery, silk screening, printing, etc. using the University's name, marks, logo, seals or symbols you must complete a Licensing Approval form before you can place an order. http://www.uvm.edu/~license/?Page=waiver_proc.html
Bus Rental	<ul style="list-style-type: none"> • Travel Location • Dates (or range of dates if blanket PO) • Quote from bus company

Vehicle Rental	<ul style="list-style-type: none"> • Vehicle type and size • Number of vehicles to be rented • Number of days and what they are • Pick up and drop off times • Confirmation number • Name of driver(s) – Must be certified by UVM Risk Management, 802-656-3242.
Conference Registration/Sporting Event/Retreats/Trainings/etc.	<ul style="list-style-type: none"> • Location (or virtual) • Dates • Names of participants (where applicable)
Food Purchase	<ul style="list-style-type: none"> • What is the purpose? • Location • Date • Who is expected to attend (if there are less than 8 people, names must be provided) • Catering Waiver rules apply and a copy of the waiver submitted with this form.

For gas card requests travel approval (if outside of VT) and off-campus event submission completion/approval is required.

If your purchase type does not fit into one of the categories above, please provide us with:

- description of purchase or service
- Location (or virtual)
- Date(s)
- Number of participants

* Expense amount or estimated price range - *quote required for all Purchase Orders (upload document below)*

* Source of Funding (Please refer to your FY23 approved budget to confirm where money should be spent from)

- Budgeted (fund 130)
- Fundraised (fund 131)
- Both
- Supplemental Funding (prior approval required)

Any additional information for purchase. For programming: who is being served/how many/what form (in-person, virtual, hybrid)

Upload all relevant documents (quote, catering waiver, travel approval, etc.)

UPLOAD FILE

PREVIOUS

NEXT

Review Submission

If you have reviewed and completed the necessary steps below, please submit your Form for approval. To visit sections you have not reviewed or completed, please click on the step immediately preceding where you left off in order to continue through the remainder of the Form.

Submission



In Progress

FY'23 SGA Spending Request Form

1. FY'23 SGA Spending Request Form

- Instructions
- RSO Information
- Request Information

SUBMIT

Spending Approval

- After submitting a spending request, you must wait for confirmation of approval from the Finance Office. Any spending or agreement to vendors before this approval is granted will constitute as unauthorized spending.
- The approval will be directly on you UVMClub Spending request form submission.
- Approval notification will say something like this:
 - "Congratulations! Your request has been conditionally approved. Please attach specified documents to this form."

Credit Card Purchases

- ▶ Credit Cards can be used by SGA RSOs to make purchases from vendors that accept credit cards. Some examples include:
 - ▶ Amazon
 - ▶ Staples
 - ▶ Target
- ▶ Credit Cards should be used to make purchases that are online in the Finance/SGA Office.
- ▶ If credit card purchase or over \$2,500 it is better to use a Purchase Order, we will instruct you to do so when cases like this arise.
- ▶ When you receive the approval notification on UVMClubs it will give you instructions on what times are available to schedule making a purchase in the Finance Office.

Purchase Order Request (PO)

- Legal promise of payment from the University
 - Most vendors accept POs
- Submitted before purchase - **NO BACK-DATING** or **REIMBURSEMENTS**
- Requests submitted at least 6 weeks in advance

Purchase Orders (cont'd)

- Do NOT commit money to any vendor before PO
 - Unauthorized Spending
- Have ALL necessary paperwork before submitting request
 - Quote/Estimate/Contract/Agreement, W9, etc.
 - Example documents: Contractor Form, Base Contractor Form, Temporary Employee, Service Agreements, & Risk Management
- Respond promptly to notices from Treasurer, Financial Assistant, and other office staff.

Blanket Purchase Orders

- Created when multiple expenses to the same vendor are expected for recurring orders (2 or more)
- Some examples
 - Repeated vehicle rentals from the same external vendor
 - Monthly fees
- Convenient because you won't have to keep making purchase orders for items that are recurring

'Orange Card' (Charge Card)

- An option to request an orange card is on the: Spending Request Form
- Used to pay for purchases within University
 - Ex: Print and Mail Center, Bookstore
- One transaction per card
- Authorized by SGA Finance Office

**Student Government Association
SUPPLIES PURCHASING/PRINT & MAIL CARD**

ORGANIZATION: _____ DATE: _____
Supplies Needed/Work Requested: _____

Oper Unit	Dept	Fund	Source	Function	PC Business Unit	Project	ActivityID	Program *	Purpose *	Property *
0 1 3 0 4 5 6				7 0 1				0 0 0 0		0 0 0 0

PMC Code: Estimated Cost: \$ _____ (Cannot exceed this amount)
 Requested by: _____ Phone: _____

CAMPUS ADDRESS: 311 Davis Center PHONE: 656-2053 FAX: 656-7719
SGA APPROVAL: _____ DATE: _____

Bookstore: Please hold cards and invoices for pick-up.
Print & Mail: Please record the actual cost and return card and copy of invoice to 311 Davis Center. Actual Cost: \$ _____ Work Done: _____

SGA Purchase Portal

- ▶ When using SGA purchase portal when you need to collect money on behalf of your organization
 - ▶ Dues
 - ▶ Apparel money
- ▶ To submit a requests to use SGA Purchase Portal you can find the form on the UVM Clubs home page.

Unauthorized Spending Consequences

- ▶ **First** time clubs participate in unauthorized spending they will receive a verbal warning and a reminder of what constitutes unauthorized spending.
- ▶ **Second** time a club participates in unauthorized spending they will pay a 10% fee which will be calculated using the unauthorized purchase total.
- ▶ **Third** time a club participates in unauthorized spending they will pay a 20% fee which will be calculated using the unauthorized purchase total.
- ▶ **Fourth** case of unauthorized spending, their spending privileges will be revoked until the next fiscal year.
- ▶ Please note: The **SGA reserves the right to deny reimbursement if the spending is not authorized.** There is no reimbursement for any taxes paid for any purchases made in locations where the University of Vermont is tax exempt. It is the responsibility of the organizations to indicate their tax-exempt status before a transaction occurs.

Vehicle Rental

- Risk Management approval for driving all rentals
 - Minimum age of 19 years old
 - Course certification
 - http://www.uvm.edu/~riskmgmt/?page=driver_train/index.html
 - Transportation policy:
 - <http://www.uvm.edu/sga/resources/documents/sgatransportationpolicy.pdf>
 - 2 drivers needed for trips over 50 miles from campus

SGA Vehical Rental

- Must be reserved no more than four weeks in advance
- SGA Fleet
 - 8 Vans (12 passenger vans)
\$70/day
 - 1 pick-up



Outside Vendor Vehicle Rental/Travel

- Outside vendors- thru purchase orders
 - Cars/vans
 - Avis 12 passenger reserve by email or phone (10+ days, with driver names)
 - Hertz - (cars/SUVs) reserve thru UVM Clubs
 - Enterprise (driver must be at least 21 years old) - reserve online specifying services are for UVM business
 - School Bus (quotes from each vendor, both contracted vendors)
 - First
 - STA/Mountain Transit
 - Coach Bus
 - Premier Coach (contracted vendor, must go to Premier first)
 - Lamoille Valley Coach
- These services require a purchase order
 - Must fill in additional information section of Purchase Order Request Form

Questions?

