

PURCHASING GUIDE

Student Organization Management

2018-2019

Office of Student Life & Engagement

Please reference the 2018-2019 Student Organization Manual for a detailed guide on completing purchases.

1. Preparation

- **Are the funds coming from your Annual Budget, Agency Account, or an alternative funding stream?**
- Annual Budget: check to make sure the purchase items were approved in the annual budget allocation
- Agency Account: check that there are enough funds available
- If alternative funding streams are partially covering the purchase, collect contact information from the department/organization
- If alternative funding streams are covering 100% of the purchase, complete the payment through that department (not OSLE)
- Research costs, shipping/delivery if applicable, gather contact information on vendors, decide on a contact person for pick up/delivery, and save hyperlinks for online orders
- If a payment needs to be sent to an individual/company for services provided, collect contact information and preferred method of payment

2. Purchase Request Form

<https://www.surveymonkey.com/r/RequestToPurchase>

- Complete and submit a Request to Purchase form through Survey Monkey
- Form located through the Student Organization Link on Blackboard Learn
- Include costs of items needed, quantities, accounts/source of funding being used, vendor contact information, links to online orders
- **Must be submitted at least 14 days in advance of the needed purchase date**
- Please allow 5 business days for processing
- Your patience is appreciated during times of high program activity for OSLE (expect minor delays in response time)

3. Status of Purchase

- **The person who submitted the purchase request form will receive the status email of the purchase request: approved, denied, or more info needed**
- The status email will provide instructions on how to proceed with the order/payment
- Depending on the type of purchase, the instructions will vary - please read the email carefully
- For credit card purchases, an OSLE staff member will complete the payment; Students do not personally make payments
- Email confirmations are sent as soon as payments have been completed

4. Pick Up/Delivery

- Items ordered online can be delivered to OSLE or to another specified location
- Food orders may be picked up at the vendor or delivered to a location
- Food delivery orders receive a standard 10% tip; please take this into account when budgeting the purchase cost
- Do not add an additional tip upon receipt of the order
- Items delivered to OSLE are stored in the student organization cabinet outside of the office
- Email notifications will be sent when orders arrive

Things to remember ...

- Majority of purchases are required to have a corresponding event request; exceptions include charitable donations and purchase of personal items for student organization members (both only permitted through agency accounts)
- If you have registered an ongoing event that requires ongoing purchases, please reference the event name on the original event request form
- Thomas Jefferson University is TAX EXEMPT; OSLE can provide a tax exempt form for vendors
- OSLE does not approve reimbursements for students; do not make a purchase in advance without approval and request to be reimbursed
- Check requests may take up to 4 weeks for processing with accounting; please keep this in mind if your purchase requires a payment by check