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## ASI & SC Purchasing Authority Policy

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### PURPOSE

The purpose of this policy is to provide standards and guidelines for individuals that wish to purchase necessities using different line items within a budget within their respective organization.

### POLICY

Organization budgets are overseen and approved by Associated Students Inc. and the University Student Center Boards of Directors. Each department within these organizations has a budget with multiple line items that are used to service students of the University. Executives and/or professional staff who oversee individual departmental budgets may utilize funds within their department's budget from various line item accounts, provided their total departmental expenditure does not exceed the department's overall approved budget amount.

This policy was voted on and approved by the:

ASI Board of Directors on 05-19-2020

SC Board of Directors on 05-21-2020

The following signatures by the ASI Vice President of Finance and SC Vice Chair of Finance verify the approval of the ASI and SC Board of Directors:

Zoe Martinez

Zoe Martinez (May 13, 2021 12:38 PDT)

Zoe Martinez - ASI Vice President Finance

May 13, 2021

Date

Teresa Serna

Teresa Serna (May 13, 2021 12:49 PDT)

Teresa Serna - SC Vice Chair of Finance

May 13, 2021

Date

## PROCEDURE

- 1.0 The individual seeking organizational purchasing authority must first fill out a Purchase Request form (PRF) stating which organization they are representing. A copy of the PRF is attached to these procedures for reference – see Attachment A.
  - 1.1 Within the PRF, the requestor must identify and provide a detailed explanation what they need their requested funds for
  - 1.2 Within the PRF, the requestor must identify the amount of funds they wish to spend from the appropriate line item
  - 1.3 Within the PRF, the requestor must identify from which account the item(s) will be paid.
  - 1.4 Within the PRF, the requestor must identify how payment will be made (i.e. corporate Visa, invoice, EFT, etc.)
  - 1.5 If the PRF is for a purchase that was not included in the departmental budget, or if the purchase is for an amount over what was originally budgeted for that item, this should be noted on the form
- 2.0 Once complete, the PRF is forwarded electronically to an assigned staff member, who will then circulate the PRF to obtain the required e-signatures (as outlined below)
  - 2.1 *All* PRF`s must be approved/signed by the requestor and the requestor`s direct supervisor.
  - 2.2 Additional approval/signatures are required for the following purchases:
    - 2.2.1 All PRF`s for an amount over \$500.00 require the following approval/signatures:
      - Department Manager or Assistant Director (where applicable)
      - Executive Director
      - ASI Vice President of Finance (for ASI purchases)
      - SC Vice Chair of Finance (for SC purchases)
    - 2.2.2 All PRF`s for Hospitality purchases (account 660837) regardless of requested amount, require the following approval/signatures:
      - Executive Director
      - ASI Vice President of Finance (for ASI purchases)
      - SC Vice Chair of Finance (for SC purchases)
    - 2.2.3 Any PRF for items not included in the departmental budget or that are higher than the budgeted amount for that item, require the following approval/signatures:
      - Executive Director
      - ASI Vice President of Finance (for ASI purchases)
      - SC Vice Chair of Finance (for SC purchases)
    - 2.2.4 All PRF`s require the signature of at least one professional staff member. If the

above procedures result in the absence of a professional staff member's signature, the PRF will be forwarded to the Executive Director for final approval/signature, regardless of the purchase amount being requested.

3.0 When final purchase price exceeds the approved amount (as listed on the PRF):

3.1 If the final price of the purchase is over the approved amount (as listed on the approved PRF) by less than \$20.00, no action is necessary.

3.2 If the final price of the purchase is over the approved amount (as listed on the approved PRF) by \$20.00 or more, the original requestor will be required to complete a new PRF for the higher amount.

- The new PRF needs to specifically state the reason the purchase went over the approved amount.
- The original (underpriced) PRF should then be included with the new PRF which is then re-circulated for required signatures.

# ASI & SC PURCHASE REQUEST FORM

Date of Request: \_\_\_\_\_ Requestor's Name: \_\_\_\_\_ Ext. # \_\_\_\_\_ Org. \_\_\_\_\_  
 (Please Print)

## Vendor Information

Name	
Address	
City/St./Zip	
Contact Person	
Phone	

Quantity: _____
Unit Price: _____
Sub-Total: _____
Tax: _____
Shipping: _____
Misc. Charges: _____
<b>TOTAL: \$ _____</b>

## Description of Expenditure (Please, be thorough):

*\*Please Attach Any Supporting Documents*

Check this box if this item was NOT included in your original departmental budget OR if the amount will be higher than what was approved in your annual budget

## Method of Payment

- Check   
  Bill Us   
  ASI Visa   
  SC Visa   
  EFT  
 To be split between ASI & SC *(If Split, signatures needed from both organization officers)*

Acct. Name: \_\_\_\_\_

Account#: \_\_\_\_\_ Dept.# \_\_\_\_\_ Program Code: \_\_\_\_\_

## AUTHORIZED SIGNATURES:

*\*Minimum of two signatures required*

_____ Requestor	_____ Date	_____ Teresa Sema, SC Vice Chair of Finance <i>(If required per policy)</i>	_____ Date	_____ Cesar Rumayor Exec. Director <i>(If required per policy)</i>	_____ Date
_____ Supervisor	_____ Date	_____ Zoe Martinez, ASI Vice President of Finance <i>(If required per policy)</i>	_____ Date		
_____ Assistant Director/Manager	_____ Date				

*(If required per policy)*