Office of Student Involvement

PURCHASE REQUEST QUICK GUIDE

Purchases/Payments may only be made after your Budget Request has been approved

** If your purchase is related to an event your club is hosting, your event must be approved by OSI before proceeding with any purchases**

Create a Purchase Request on WesNest. The Purchase Request can be found on your group's Finance page of WesNest, under 'Create Request'. There, you may request a Credit Card Purchase through OSI, Student Reimbursement, or Vendor Invoice Payment.

Filling out your Purchase Request form

Complete the Request Details section:

Subject: Enter a brief description of what you are purchasing or who you are paying.
Description: Explain why your club is requesting the goods or services. This is required by the University and describes the purpose of the request.
Requested Amount: Specify the amount you wish to spend on this purchase request- do not exceed your approved budget.
Category: You will then choose a Category that most closely matches this purchase.
Account: Choose your funding source. There are up to five options:

1. *Slate Budget:* Student Activity funds managed by the WSA, which are requested at club re-registration for anticipated expenses for the entire school year. Not all organizations have a Slate budget.
2. *SBC Allocations*: Student Activity funds managed by the WSA, which are used for regular expenses and planned activities in alignment with the club's mission and SBC guidelines.
3. *Income Account*: Funds generated by the club through its activities, which are separate from SBC allocations or external funding sources.
4. *Heritage Month Allocation*: Student Activity funds managed by the WSA, which are used exclusively for purchases related to planned and approved Heritage Month events in alignment with the club's mission and SBC guidelines.
5. *Combination of SBC Allocation and Income account*: You may request funding for club expenses and activities using a combination of funds from your SBC account and Club Income Account. You must submit two separate Purchase Requests, one for the amount requested from your club's SBC account and one for the amount requested from the Club Income account: the sum of these requests should equal the total amount of funding you are requesting.

Complete the Additional Information section:

- ☐ You will be prompted to confirm your funding source and select the **Purchase Method**: **Credit Card Purchase** (through OSI), **Student Reimbursement**, or **Vendor Invoice Payment**. Please note there are vendors that OSI cannot make credit card payments to, which are listed on the Purchase Request form and in the Club Leader Manual (CLM). Additionally, OSI **cannot** process credit card payments or student reimbursements for purchases from Limited Liability Companies (LLCs) or transactions through peer-to-peer apps such as Venmo and Zelle. OSI can only pay LLCs via invoice.

- ☐ **File Upload:** You will upload the documents required to process your request:
  1. For Credit Card Purchases through OSI: upload a list of the items (with links and prices per item) in a Word, Excel, or pdf document. Include pertinent details such as quantities, colors, sizes, etc.
  2. For Student Reimbursement: upload a valid receipt. Refer to CLM p. 30 for details on Valid Receipt Criteria.
  3. For Vendor Invoice Payment: upload a valid invoice. Refer to CLM p. 31 for details on Valid Invoice Criteria.
  4. For purchases for an Event with food or drink that **your club is preparing**: upload your club's University-approved, completed Food Preparation Waiver to the **DISCUSSION SECTION** of the Purchase Request form.
- ☐ **Input the Vendor Name and Email Address:** this will be the name of the Company/Person being paid and their email address if applicable.

Appointment Scheduling (only if making a Credit Card Purchase through OSI):

If you are making a credit card payment or online purchase request, you are required to schedule an appointment with OSI staff. It is not necessary to schedule a meeting for other Purchase Methods. There are scheduling links in the Purchase Request form and on the OSI webpage.

Credit Card Purchases through OSI

Prepare for your credit card appointment!

Placing orders from online vendors:

- ☐ Upload a spreadsheet of the items you would like to purchase to your Purchase Request. Include links to the items and have alternatives in mind in the event an item is unavailable.
- ☐ Make sure the total sum of your order is within the budget approved for this request. When putting together estimates for online purchases, follow the checkout process all the way through the taxes and shipping to ensure the order will not exceed your budget.

Placing phone orders for catering/food:

- ☐ Upload a spreadsheet of your itemized food order to your Purchase Request.
- ☐ Call the restaurant ahead of your credit card appointment and provide them with your order:
  1. Give them the date and time of the event/when you would like to receive the delivery, the address for the delivery, and the name and phone number of the student who will be accepting the food delivery.
  2. Let the restaurant know you will be calling during your credit card appointment to pay for and place this order- make sure they will be able to take this call at the scheduled time.
  3. Let the restaurant know you will need to have a receipt showing the itemized order and payment sent immediately after it is processed to the OSI staff member making the purchase.

Making Rental Vehicle Reservations:

- ☐ ALL student drivers must become an **Authorized Driver** through Transportation Services. In the **Description** section of the Purchase Request form and during your credit card appointment, provide the Name and Age of the student driver(s).