Division of Academic and Student Affairs Activity & Service Business Office PantherConnect Purchase Request





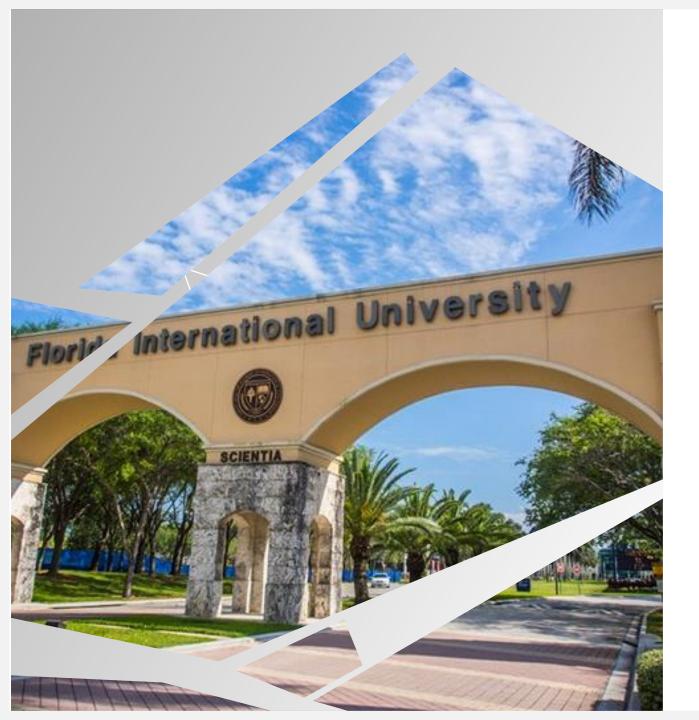
About Us

GC 2200 Ph: 305.348.3077 Fax: 305.348.6001 <u>asbo@fiu.edu</u> Office Hours: Monday – Friday 8:30 am to 5:00 pm

ASBO

The Activity & Service Business Office (ASBO) coordinates University Wide Activity and Service (A&S) Fee disbursements. The office works along with the Student Government Association comptroller to ensure that all A&S funds are allocated properly and that all recipients of funds comply with the SGA Finance Code along with all University policies and procedures.







Mission

The mission of Activity & Service Business Office is to assist the recipients of A&S funds by facilitating the access to use their approved funds, while providing quality support services efficiently and effectively.



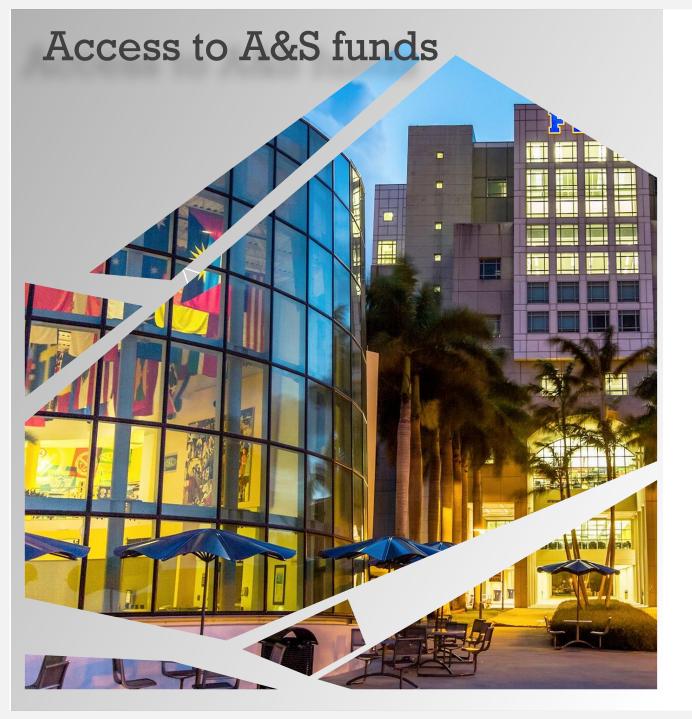
Purpose of A&S fee

A&S fees support student organizations and enhance student services and student engagement which benefit the entire student body.



Events paid from A&S funds must be open and free of charge to all FIU students.







Advisor Level

For all student clubs, organizations and councils the Advisor and/or Campus Life Advisor approval is required.

SGA Finance Code



SGA Finance Code requires that all expenditures be made through an established process. In order to spend your SGA funds you must complete a Purchase Request through **PantherConnect**.

Support

The Activity and Service Business Office along with the Campus Life Accounting office at BBC are available to assist and instruct the student leaders about the policies and procedures of the University.



PANTHER Connect



Purchase Request

The method for student organizations and councils to request access to their allocated funds for programming, events, marketing, meetings, travel and other.



Documents needed for a Purchase Request

Vendor Quote/Invoice

- List or invoice of items and/or services being purchased for an event.
- Only the FIU General Council's office is able to accept and sign agreements/contract. Never sign or accept term and conditions on FIU's behalf.

Flyer

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- Attach a flyer or announcement, or copy of the social media listing with date/time/place.
- The announcement must have the SGA logo or affirm that the event is funded by SGA and...
- Must state that it is "Open to all FIU students"

Travel Documents

- List of all students traveling with full name and panther ID.
- Signed release forms for each student traveling.
- Agenda/itinerary of the conference.
- Registration fee information.
- Hotel information (room rate)

Additional Travel Information

- Airfare quote
- Car rental quote FIU has contract with Enterprise and National only for car rental.

Prohibited Purchases

Discouraged Purchases

- Any items prohibited by law or SGA regulations and FIU policy.
- Alcoholic beverages or products with alcohol content and any related items or services such as bar tendering.
- Items or services for an event at a private residence.
- **Flowers** (unless it is centerpieces for official university functions)
- Gift cards
- Candles (only battery operated)
- No Raffles Allowed
- Personal gifts and personal use items (purchases must be for the official use of the organization)

Clothing other than t-shirts. SGA reserves the right to approve or disapprove any other clothing item request based on whether or not it is considered a personal item or one that has recurring use. Clothing must be relevant to FIU.

Raw food items for cooking.

Promotional items not being used in bulk and the cost per item is deemed excessive. Food for scheduled board/organizational meetings (minimum of 10 students are required to attended)

Awards of any nature other than trophies, plaques and certificates.

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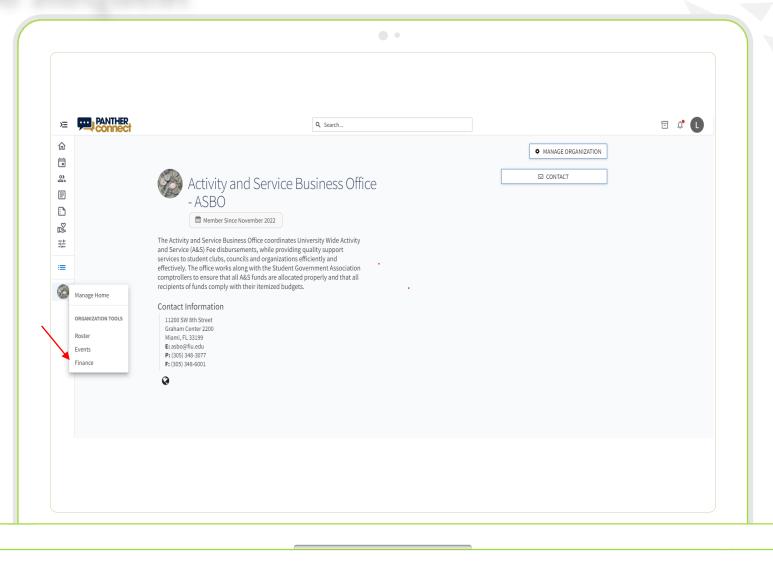
Starting a Purchase Request

Sign in to

PANTHER connect

https://fiu.campuslabs.com/engage/

After signing in select your organization on the left hand side, click on the organization icon again and click and select *Finance*.



Starting a Purchase Request

PANTHER connect

- Once you are in your *Finance*.
- Click on *Create Request* and a drop down menu will appear, select *Create Purchase Request* and fill out the form.

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Important Information

Purchase Request must be submitted at least: 15 business days prior to event 35 business days prior to any travel

Requests are reviewed by Campus Life advisors (M-F 9AM to 5PM).

Only completed forms with all required information will be reviewed, all others will be denied.

For CSO/SOC clubs, Campus Life advisors will review the forms after the organization advisor has approved the request.

The Purchase Request must be approved by the Campus Life advisors **PRIOR** to continuing with process and payment by:

•Activity & Service Business Office @MMC - GC 2200 (305)348-3077

•CL Accounting @BBC - WUC 141 (305)919-5804

Procedures - Purchase Request

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Create Purchase Request

Request Details	POPULATE FROM BUDGET
*Subject	
Title of the event or conference event / Vendor Name	
Description	
Brief description of the event	
Brief description of the event	
Requested Amount	
Brief description of the event Requested Amount \$ 0 <u>Total \$\$ amount requested</u>	
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Requested Amount \$ 0 Total \$\$ amount requested *Categories *Account	r account – you will see your





Procedures - continue

* Date of Event / First Day of Travel / Anticipated Purchase - MM/DD/YYYY

Date of event

* Vendor Name, Phone Number and Website Type N/A if traveling.

Vendor's Name

Example: Publix, Papa John's, Amazon, Walmart, Artees * List of items being purchased - Add link with items and/or cart share link for faster processing.

List of items that are requested

to be purchased

* Benefit(s) to FIU - Please explain how this request benefits the FIU Student Body.

* How many FIU students do you anticipate to be in attendance at your Event/Program/Meeting? If purchase is not related to an Event/Program/Meeting, indicate N/A

Amount of students anticipated to attend

*

Please upload the following:

- · Vendor quote (must be included and it is needed for payment)
- Flyer/Announcement/Event Link which should include date, time and place of event.
- FOR TRAVEL ONLY Must upload the PDF of your APPROVED Travel Request from Panther Connect

Additional Information

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Additional Information

Purchase Request must be submitted at least:

- 15 business days prior to event/item to be purchased
- 35 business days prior to date of travel

Requests are reviewed by Campus Life advisors (M-F 9AM to 5PM). Only complete forms with all required information will be reviewed, all others will be denied. For RSO clubs, Campus Life advisors will review the forms after the organization advisor has "change stage" to campus life advisor in the request.

This form must be approved by the Campus Life advisors **PRIOR** to continuing with process and payment by:

- Activity & Service Business Office @MMC GC 2200 (305) 348-3077
- CL Accounting @BBC WUC 141 (305) 919-5804

FOR SPORTS CLUBS ONLY:

Purchase requests must be approved by the Assistant Director of Sports Programs PRIOR to continuing with process and payment.

* Purpose of Request - Please select one

Meeting

Event/Program - Provide the web link to your APPROVED event in PantherConnect below. This will be used in lieu of a flyer/announcement which is required to complete a Purchase Request.

NOTE: Please wait to submit this request until you receive Event approval in PantherConnect otherwise any Purchase Request for events/programs will be denied.

Travel

Marketing

Other (specify)

Additional Information

* Required

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I understand that I will be responsible for the timely submission of receipts and attendance sheets for purchase request. I understand that I will be responsible for the timely submission of hotel folio, boarding passes, car rental information and any other information as needed for travel request.

Failure to provide the necessary information 10 days after the event/travel has occurred may cause a hold to be placed on your student records.

Additionally, I understand that items and/or services purchased with A&S funds can't be used for fundraising or for profit and items classified as "Attractive Property" must remain at FIU.

* Student's Phone Number

Student Phone number required

FOR ADMINISTRATION ONLY - POST-PURCHASE INFORMATION

- Receipts
- Sign in list / attendance
- Travel documents as needed

UPLOAD FILE

For Administration only - Additional post purchase documentation



For Administration only - Additional post purchase documentation



SUBMIT REQUEST CANCEL

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Flowpaws for the Purchase Request



Student

- Only the President or Treasurer will be able to submit a Purchase Request.
- Please inform your advisor to log in and review the submitted Purchase Request.

Organization's Advisor

- After reviewing the Purchase Request, the advisor will need to change the stage to the CL Advisor.
- Campus Life Advisor
- After review and approval, the CL Advisor will change the stage to ASBO or CL Accounting.
- If the request is denied, the student will be notified by email.

Payments Agent

After approval from CL Advisor you will need go to ASBO in GC 2200 or CL Accounting in WUC 141 to place the order and make payments.

For Students

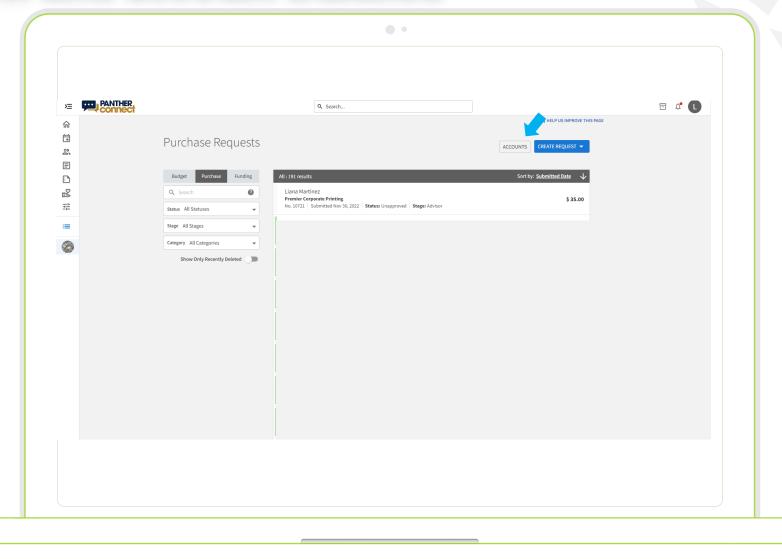
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- An email will be sent to the student if approved/denied.
 - If request is not approved, student must submit a NEW Purchase Request again with revisions as instructed.

To view transaction and account balance

PANTHER connect

• To view all transactions and obtain your organization balance you go back to Finance and click on accounts.



Fund Balance in Accounts

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3	Submit financial requests for organizatio	n funding or purchases made. Plea	ise note that these requests are not tied to actual monie	es and are for information only.	
Ē		BUDGET REC	QUESTS PURCHASE REQUESTS ACCOUNTS		
		BODGET REC			
23	Name	Description	Parent	Balance	Available
ቱ	ASBO Shared Services	A&S Overhead	Activity and Service Business Office	\$2,017.00	\$2,017.00
:=		do not use	Z"INACTIVE" Campus Life BBC	\$0.00	\$0.00
B		do not use	Z"INACTIVE" Campus Life BBC	\$0.00	\$0.00

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General Information

Attention

- Individuals/organizations that make a purchase without prior approval should understand that they will not be reimbursed and should consider the purchase a donation.
- No students or organizations are allowed to cook food. Food items must be purchased ready for consumption.
- Please remember to include tip and shipping in the total dollar amount requested.
- When purchasing items that are classified as "attractive property", organizations need a letter from their advisor explaining where the items are going to be stored.
- Receipts and sign-in sheets must be turned in within 10 days after the event/travel

Post event/travel documents required







Paid Receipt

Original receipt Invoice showing paid balance Attendance Information

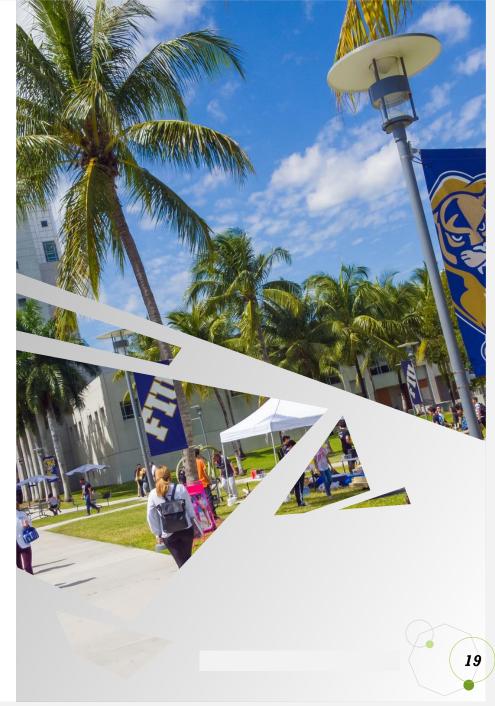
Sign in sheet

Card reader list

Travel Receipts

If applicable:

- Hotel receipt (folio)
- Boarding pass
- Car rental receipt



Questions?

Activity & Service Business Office 🔺

305-348-3077

asbo@fiu.edu ⊠

www.fiu.edu 🌐