

GUIDE TO PROCESSING AND SUBMITTING A PURCHASE ORDER

This reference guide will assist the user in preparing a Purchase Order. The complete Purchasing Policies and Procedures can be accessed here: <https://www.fdu.edu/wp-content/uploads/2022/04/purchasing-policies.pdf>

AN APPROVED PO MUST BE IN PLACE BEFORE ANY GOODS OR SERVICES ARE RECEIVED.

Requests for purchases must be initiated using the Purchase Requisition/Order Form. https://purchase-orders.fdu.edu/secure/po_pdf.pdf

We emphasize the need for departments to plan their needs well in advance and allow sufficient time for the review process.

Submit completed requisitions including pertinent back-up and approvals to requisitions@fdu.edu. Attach only one PO per email.

The PO must be signed by the budget officer responsible for the account identified as the source of funding and approved in accordance with signatory approval. It can be a physical or electronic signature, or an email authorizing the purchase. For **addendums**, the dollar amount of the original PO plus the amount of the addendum must not exceed the signer's total signing authority limit.

Addendums

An addendum is necessary when more funds are needed due to additional costs not listed on the original estimate. Some examples are shipping costs or additional attendees at an event, or over-runs on production.

The original PO# must be noted on the addendum, and back-up substantiating the addendum must be submitted to requisitions@fdu.edu.

Steps to Fill Out an Addendum:

- Use the regular PO form and fill in the ship to and supplier information as normal.
- In the amount section, only put in the amount you want to add to the original PO.
- In the description section, note "addendum" and the original PO number with a description of why the addendum is needed. Please attach all pertinent backup.

Backup documentation

Supporting documentation such as quotes, proposals, contracts, etc., **MUST** be attached to the Purchase Order submission. Purchase Orders cannot be processed if the pertinent documentation is not included. POs requiring contract review, or the use of logos, etc. need the approvals attached when submitting POs.

See approval section 5.0 of the Purchasing Policies and Procedures

Logo use

Approval from the Vice President for Communications is required prior to using the University name or logo. Please attach this approval as backup to your PO upon submission. Please see section 5.4 of the Purchasing Policies and Procedures.

IT Purchases

For a list of approved docking stations, monitors, etc., and complete OIRT policies please visit <https://it.fdu.edu/>.

Contract Review (if applicable)

This policy is to ensure that any commitment of university resources and all related agreements obligating the University are properly reviewed and approved. The link to the Contract Review Policy is as follows:

<https://www.fdu.edu/wp-content/uploads/2019/09/14902.pdf>

Once the Contract Review process is complete, the Purchase Order can be created and submitted to Purchasing. All necessary backup such as quotes, contracts, agreements, approvals, and confirmation from Contract Review to move forward with the PO, must be included. The Purchasing Department will send the approved PO and the signed contract/agreement to the vendor and to the ordering department. **Contracts cannot be sent to the vendor without an approved PO in place.**

Certificate of Insurance (COI)

A COI is required for all vendors coming on campus to deliver goods or provide services.

<https://www.fdu.edu/about/university-leadership-offices/office-of-risk-management/>

GENERAL INSTRUCTIONS FOR EVENTS AND TRAVEL POs:

On-Campus Events

PO must include:

- Date, time, and location of event
- Event description (performance, activities, etc.)
- **Required backup:** Completed Event Production Agreement (EPA) obtained from General Counsel—this is a pre-approved contract that does not require review unless any changes/additions are made to the terms.
- Special equipment needed, such as generators, etc.
- Number of attendants to be present
- NEW vendors must submit a current Certificate of Insurance (COI). The COI must be included with the PO submission.
- DO NOT SIGN QUOTES/ PROPOSALS

Off-Campus Events

PO must include:

- Date, time, and location of event
- Number of participants (students/faculty/ staff)
- Amount and due date of a required deposit. The ordering department is responsible for following up with AP regarding the deposit payment.
- **Required backup:** Quotes, reservations, etc.

Off-Campus Dinners / Banquets

PO must include:

- Date, time, and location of event
- Number of participants (students / faculty / staff)
- Amount and due date of any required deposit. The ordering department is responsible for following up with AP regarding the deposit payment.
- **Required backup:** Quote/Contract for banquets and approval from Contract Review if applicable
- Completed Alcohol Use Form if applicable

Events on Campus with Alcohol – A PO for the university-approved liquor vendor must be submitted and approved prior to the event. The department should inform the university's catering service of the event and coordinate the delivery. Unused alcohol should be returned for a credit to the liquor vendor.

Before creating a PO, please review the University's Alcohol Use Policy.

PO must include:

- Date, time, location, and type of event
- Date and time the delivery must be made to the university's catering service
- Name and phone number of staff/department contact present on the day of the event
- Write on PO: DELIVER TO ARAMARK
- Quote
- Completed Alcohol Use Form

STUDENT TRAVEL & LODGING

All travel and lodging must be processed using a Purchase Order.
All overnight lodgings require a review and approval by Risk Management.
Please attach the approval when submitting the PO to Purchasing.

Student Air Travel for University sponsored trips

PO must include:

- Date, destination/event
- Number of passengers, flight numbers, departure, and destination airport
- DO NOT INCLUDE ANY WISP OR PI INFORMATION!
- **Required backup:** Booking confirmations and approval from Risk Management
- DO NOT SIGN QUOTES/RESERVATIONS

Student Lodging

PO must include:

- Name of event lodging is needed for
- Check in and check out dates
- Number of rooms, number of nights, and cost per night
- Any additional taxes or charges
- Reservation number(s)
- Number of faculty /staff / students
- **Required backup:** Reservation confirmations. If a contract is used, attach approval from Contract Review
- Approval from Risk Management

Student Bus/Ground transportation

PO must include:

- Date, time, name of event and destination of trip/travel
- Trip confirmation number
- Pick up / Drop off times including location address
- **Required backup:** Trip confirmations and cell number for faculty/staff trip leader
- DO NOT SIGN QUOTES/RESERVATIONS

INVOICING

Invoices should be reviewed for accuracy prior to sending to Accounts Payable.

The Purchasing Department does not process invoices.

Any questions related to invoices / payments need to be directed to the AP Manager.