

Purchase Request Form

This form serves as an agreement from your organization to spend org money on Supplies or a Service. We do not give orgs cash, a check, or a credit card to purchase items. Instead, this request creates a document called a Purchase Order that serves as a promise to pay from the University to the vendor.

PROCESS:

- The purchase request form will be submitted online using DocuSign. The link can be found in the SOMECA website.
- Submit a supplies request 5 business days prior to your shopping.
- Submit a service request 10 business days prior to the service needed, and you have to attach a quote.
- SOAR will send you an email through DocuSign when the purchase order is completed.
- After your shopping, please turn in a receipt to SOAR (soar@ucsc.edu)

NOTES:

- Don't ever sign a quote. If you sign a quote, you pay the quote, not the University.
- Don't have a service begin until you have a purchase order.

Purchase Request Form Guide

Date Needed

Return completed form to your SOMeCA office at least 5 business days for food or supplies or 10 business days for services prior to the date it is needed.

- **Date Needed** is the day you will be picking up the Purchase Order (PO) from your SOMeCA Office.

SECTION 2 – EVENT OR OPERATIONAL (SELECT ONE OPTION)

- In this section you indicate whether the Purchase Request is for an “Event” or “Operational” expense:
 - **Event:** A completed **Event Proposal** form (EP) must be turned in to your SOMeCA office prior to requesting funds
 - **Operational** expenses are related to ongoing functions for your organization (ex: binders, canopy, flyers)

SECTION 3 – VENDOR (MUST HAVE 204 FORM ON FILE)

- Vendor is who you will be purchasing from
- It’s important you provide the address of the vendor. You can visit our SOMeCA website with a list of commonly used vendors
- If a vendor is not in our system, they will need to fill out a 204 Form.
- Indicate the purchase type while still following the allocated business days.
- Add a description of the items that will be purchased.
- For the purchase of **food**, please meet with your organization’s advisor.
- If requesting a service, a quote has to be attached to this form. Quotes requirements:
 - Name of the vendor
 - Contact information of the vendor
 - What services will be performed, date, location
 - How much is being charged

SECTION 4 – PAYMENT

- The university will process payments from your organization’s account. Indicate what source of funding in your account you want to use.
 - ***Earned Income is funding your organization has earned through fundraisers, membership dues, etc***
- If more than two funding sources will be used, please indicate in the “Notes” section.

SECTION 5 – AUTHORIZATION

- This section authorizes payment which verifies organization’s approval.
- Authorized Representative will sign through DocuSign

Completed forms are turned in to your SOMeCA Office
View next page for a completed sample form

Purchase Request



Date Needed **10/9/2020**

Return completed form to your SOMECA office at least 5 business days for food or supplies or 10 business days for services prior to the date it is needed.

SECTION 1 – CONTACT

Name Sammy Slug	Organization Turtle Club
Email sslug@ucsc.edu	Phone 831.459.2934

SECTION 2 – EVENT OR OPERATIONAL (SELECT ONE OPTION)

<input type="checkbox"/> 1 Event Professional Development	Date 10/9/2020	<input type="checkbox"/> 2 Operational
<input checked="" type="checkbox"/> Location Zoom	Estimated Attendance 20	Supplies not related to an event

SECTION 3 – VENDOR (MUST HAVE 204 FORM ON FILE)

Vendor Turtle Sammers	Street 1156 High Street	City Santa Cruz
<input checked="" type="checkbox"/> This vendor has not been a UC employee in the past 2 years. <i>If they have, do not continue. Contact your advisor.</i>		
Purchase Type Service	Brief Description of Items to be Purchased:	
Service: Quote required Food & Beverage: Speak to an advisor	Mr. Turtle will be a guest speaker	

SECTION 4 – PAYMENT

Indicate the amounts from the fund sources below to balance the total cost.	Notes: Please indicate needs for SOMECA to process.
EARNED INCOME \$ 250.00	n/a
EARNED INCOME \$	
TOTAL COST including tax & delivery may not exceed: \$ 250	

SECTION 5 – AUTHORIZATION

I certify this purchase request form by signing below, or via email from my UCSC Account.

Authorizing Signature	Print Name (if different from contact above) Sammy Slug	Date 9/25/2020
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OFFICE USE ONLY

Fund	Org	Account	Activity	Amount	Requisition #	Initials
					PO #	Initials
Advisor Approval						
Org Approval			Date	F&E Approval		Date
						F&E #