Timeline and procedures for Purchasing through OSL Business Center

1. Purchase for events must have a completed approved Event Notification.
2. Timeline starts at time of submission of purchase request into Catlife.
3. \* Meet with OSL Purchasing Specialist after submitting . The links and instructions for these forms can be found on the PO request form in CatLife and also at [studentlife.ucmerced.edu/business-center](http://www.studentlife.ucmerced.edu/business-center).
4. \*\* When purchase is for food, a participant list and agenda or flyer must be turned in with 2 days of event.

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| Type of Purchase: | Time need to process | Next steps |
| Declining Balance Card requests | 3 – 5 days | Submit PO request in CatLife, arrange a time to meet with Connie McBride to check out a declining balance card. |
| Purchase request involving purchasing merchandise in town using UCM credit card (procurement card) | 3 - 5 days | Submit PO request in CatLife, and coordinate with Connie McBride a date and time between 4-5pm. (shopping cart will need to be ready to be paid for). |
| Purchase request involving an established vendor | 3 - 5 days | Submit PO request. (See frequently used vender list on OSL Website under resources.) |
| Purchase request involving a “new” vendor | 1-2 weeks | Submit PO request in CatLife with vendor information. OSL Business Center will send the business UCM’s W9 procedures, which need to be completed by vendor before PO request can be processed. |
| Purchase request involving campus recharge units, catering, bookstore, Recreation and TAPS | 5 days | Submit PO request in CatLife, when approved contact the OSL Business Center for further instructions. |
| Purchase request involving campus recharge units Police or Facilities | 1-2 weeks | Submit PO request and then meet with Jim Greenwood who will put in your request. |
| Purchase request for non-travel reimbursements | Submit no later than 2 weeks after purchase. | Submit PO request and then bring in original receipts to OSL Business Center. When possible please check in with OSL before using your own money, we may have a better way to purchase. Any reimbursement over $200.00 must be pre-approved. |
| Purchase request for travel reimbursements | Submit no later than 3 weeks of travel | Submit PO request in CatLife and bring in original receipts to OSL Business Center. Receipts must be itemized and mileage claims must have mileage printout. |
| Purchase request for vehicle rental or Bus \* | 2-3 weeks | Drivers must first be pre approved through taps. Submit DMV Pull, Student Authorization from and copy of DL to Taps. Submit PO request in CatLife and also fill out vehicle rental info sheet\* |
| Purchase request for performers, speakers or facilities that require a contract agreement. \* | 4 weeks | Submit PO request in CatLife and meet with Cathy Oliver, for further instructions. Preliminary Information Form must be completed (PIF) |
| Purchase request for hotels rooms \* | 4 weeks | Submit PO request in CatLife and fill out Group Lodging form |
| Purchase request for flights \* | 5 weeks | Submit PO request in CatLife and fill out Flight request info sheet |