FSU | DIVISION OF UNDERGRADUATE STUDIES

Purchasing Procedures & Guidelines

Division of Undergraduate Studies

For UGS faculty and staff requesting goods or services using University funds

Purpose and Scope

These procedures establish the Division of Undergraduate Studies (UGS) internal process for requesting, approving, placing, receiving, and documenting purchases made with University funds. FSU-wide policies, regulations, Procurement Services requirements, funding restrictions, and any applicable sponsored-project or Foundation rules take precedence. When a purchase does not fit the standard process, contact the UGS Fiscal Manager before making a commitment to a supplier.

Submission Timeline

Timing	What to allow
Standard requests	Submit UGS purchase request form at least **2 weeks** before goods or services are needed.
Complex requests	Allow **4 weeks** whenever possible for contracts, software, services, or special requirements.
Initial review	Allow at least 1–2 business days for your request to be reviewed. Requests needing additional review or documentation may take longer; depending on the purchase, UGS budget approvers, FSU Procurement Services, and the Controller's Office may also be involved.

IMPORTANT: Do not place an order or commit University funds until all required approvals have been obtained.

Steps to Request & Complete Purchasing Process

1. **Plan ahead.** Identify the business need, required-by date, supplier (if known), item or service description, estimated total cost, and business purpose.
2. **Submit a request.** Complete the current UGS **Request to Purchase** form at least **two weeks** before the goods or services are needed. Attach a quote or itemized estimate if you already have one for items not available in SpearMart.
    - SpearMart is FSU's online purchasing system for shopping with University-contracted suppliers. Access it through myFSU at https://my.fsu.edu/ by selecting the SpearMart icon under MyFSU Links. You may browse and shop in SpearMart, but the purchase must be submitted and approved through the appropriate departmental process. Creating a shopping cart does not complete the purchase.
    - For more **complex purchases** involving contracts (or quotes requiring signature), software, services or other special requirements, submit the request at least **four weeks** in advance whenever possible. If you are unsure what documentation is needed, contact the UGS Fiscal Manager before proceeding.
3. **Obtain UGS approval before ordering.** Send the request to the UGS Fiscal Manager to review the business purpose, identify an appropriate funding source and budget, and determine the appropriate purchasing method. The UGS Fiscal Manager will assign your request to a UGS Purchasing Representative unless you are an authorized PCard holder and the purchase is eligible for payment by PCard. Do not place an order or otherwise commit University funds until all required approvals have been obtained.

4. **Purchase through the approved channel.** The UGS Purchasing Representative will coordinate the purchase using the method approved for the transaction, which may include SpearMart, a PCard transaction when permitted, or a requisition/purchase order. FSU contract suppliers and applicable procurement requirements must be followed.
5. **Receive and verify.** The UGS Purchasing Representative will typically receive deliveries. If an item is delivered directly to your office, check that it is the correct item and is not visibly damaged. Notify the Purchasing Representative of any problems and promptly forward any packing slip or other receipt documentation. Do not confirm receipt of items or services that have not actually been received or completed.
6. **Submit invoices and records.** If you receive an invoice, receipt, or other purchase-related documentation, promptly forward it to the UGS Purchasing Representative. Do not place additional orders, change an existing order, or agree to additional charges without prior approval.

> Please allow 1–2 business days for initial review and approval of purchase requests. Incomplete requests, or those requiring additional documentation or review, may take longer to process and delay purchasing.
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> Purchases may require review and approval by multiple parties, including UGS budget approvers, FSU Procurement Services, and the Controller's Office, depending on the type of purchase and applicable requirements. Please plan ahead and allow sufficient time for each stage of review. Submitting requests as early as possible helps avoid delays and allows time to address questions, provide additional documentation, and identify the appropriate purchasing method.

Events and Food Purchases

All UGS event and food purchases require advance review and approval by the UGS Fiscal Manager. Approval is subject to FSU Expenditure Guidelines, funding restrictions, and applicable Procurement Services or PCard requirements.

- Submit UGS Request to Purchase at least **two weeks** before the event and include the business purpose, event date and location, supplier (if known), itemized menu or list of items, estimated total cost, and number of attendees.
- Provide attendee names for groups of 15 or fewer people and an estimated headcount for groups larger than 15.
- Attach a quote or itemized price breakdown if available or applicable. Confirm the supplier's accepted payment methods and any ordering deadline with the Purchasing Representative.
- Wait for approval and confirmation of the purchasing/payment method before placing the order. The Purchasing Representative will coordinate payment and retain supporting documentation.

> Food purchases are subject to FSU expenditure rules and restrictions on the use of certain funding sources. The UGS Fiscal Manager must review the proposed expense and confirm the appropriate funding source and payment method before the order is placed. A PCard may only be used when the purchase is permitted and the cardholder is authorized to make that type of purchase.

Personal Purchases and Reimbursement

Employees should not use personal funds for University purchases except in an unavoidable emergency and only after consulting the UGS Fiscal Manager when circumstances permit. A request submitted after purchase does not guarantee reimbursement.

1. **Before making a purchase:** Complete the current UGS Request to Purchase form **prior to reimbursement** and select "reimbursement" as the request type. Before spending personal funds, contact the UGS Fiscal Manager for guidance and approval whenever possible. Use an approved University purchasing method whenever practical.
2. **If an emergency purchase has already occurred:** Contact the UGS Fiscal Manager and provide the itemized receipt, business purpose, explanation of why other purchasing methods could not be used, and any other required documentation.
3. **Reimbursement:** If the purchase is eligible for consideration, follow the UGS Fiscal Manager's instructions for completing the UGS Request to Purchase form and submitting a Non-Travel Expense Report in Concur. Reimbursement is subject to FSU policy, documentation requirements, and approval.

> Do not assume a personal purchase will be reimbursed. Purchases that are unallowable or that violate University purchasing requirements may be denied.

Failure to follow the guidelines above may result in the request being delayed, denied, or not processed within the expected timeframe.

Other Helpful Information:

Internal roles and responsibilities

Requester — Identifies the need, submits a complete request with supporting documentation, waits for approval before ordering, and forwards any invoices or receiving records received.

UGS Fiscal Manager — Reviews the business purpose, identifies the appropriate funding source and budget, determines the purchasing method, and provides UGS approval or requests clarification.

UGS Purchasing Representative — Coordinates the approved purchase, works with the supplier as needed, and collects purchase, invoice, and receiving documentation.

Person receiving goods or services — Typically the Purchasing Representative. If another employee receives the goods or services, that employee verifies receipt, reports any issues, and forwards receiving documentation to the Purchasing Representative.

> To support internal controls, employees should not approve their own purchases. Whenever practical, purchasing, receiving, and approval responsibilities should be separated.

Before submitting a request

- ☐ The business purpose and item or service description are clear.
- ☐ The required-by date, supplier (if known), and estimated total cost are included.
- ☐ A quote or itemized estimate is attached, if available or applicable.
- ☐ Event and food requests include the event date, location, purpose, attendee count, and itemized costs.
- ☐ The request is submitted at least two weeks in advance, or four weeks in advance for complex purchases whenever possible.
- ☐ Any special requirements, such as a contract, software, or service agreement, are identified.

> Important: Wait for the required approvals and purchasing instructions before placing an order or committing University funds.

Official resources

- FSU Procurement Services — How to Buy: https://procurement.fsu.edu/resources/how/buy
- SpearMart FAQs: https://procurement.fsu.edu/procurement-resources/frequently-asked-questions/spearmart-faqs
- FSU Purchasing Card (PCard) Manual and guidance: https://procurement.fsu.edu/pcard
- FSU Controller's Office — Expenditure Guidelines: https://controller.vpfa.fsu.edu/expenditure-guidelines

Questions about the correct purchasing method should be directed to the UGS Fiscal Manager or designated UGS Purchasing Representative before contacting a supplier or placing an order.