



Weitzman
SCHOOL OF DESIGN
UNIVERSITY of PENNSYLVANIA

Purchasing Guidelines for Student Council Fall 2023-Spring 2024

Contact:

Jenny Thuman

Financial Office Administrative Coordinator

pdpo@design.upenn.edu or jthuman@design.upenn.edu

The below are examples of common types of expenses your club may have. If there is anything that does not fall into these categories, please reach out to the Finance Office for assistance!

Before making any purchases, please first contact Jenny Thuman

It is always preferable for our office to make purchases for you, instead of reimbursing you after the fact.

Guest Speakers (in person or virtual)

*Please note: The guest will need to be added as a supplier with the UPenn Marketplace before being paid, so please give **at least 2 weeks advanced notice for processing time.***

If you would like to invite a guest lecturer to speak at a club event, please first reach out to Jenny Thuman with the following information:

- Purpose/scope of the event
- How much your club would like to pay the guest
- Their name and email address. Jenny will contact them to initiate the onboarding process with the University

Ordering From University Suppliers

Purchases to university suppliers will be paid by Purchase Order (PO). Payment process is in a multi-part process, so please give plenty of advance notice so the vendor will be paid in a timely manner:

1. **Student/student group obtains a quote or estimate from the supplier**
 - Please specify to the supplier that you are making the purchase on behalf of the University of Pennsylvania and will be paying by purchase order.
 - Please let them know we are sales tax-exempt
 - Jenny can provide them with a tax-exempt certificate if needed
2. **Forward the quote or estimate to (pdpo@design.upenn.edu). Please CC the contact/sales rep you have been working with, Jenny will contact them in the next steps.**
3. **Jenny will create the PO and return the PO # to the supplier**
4. **The supplier should submit an invoice with the PO # included**
 - The supplier should email to poinv@upenn.edu. The invoice **must** be a PDF with a unique invoice # and the PO #. They can also upload to the supplier portal if they used it

Once the invoice has been captured in UPenn's financial system, the vendor will be paid in whatever terms they are set up with the university, i.e. by check Net 30, immediate electronic payment, etc.

Ordering From Non-University Suppliers

Please note that Non-University suppliers may need to be added as a supplier to be paid by P.O., depending on how frequently we order from them, to honor tax exemption, etc.

Online Purchases:

Online purchases can be handled in a few different ways:

- Email links for what you need, as well as shipping name/address/contact phone number. I can place the order online with my P-Card
- You can bring a laptop/tablet/mobile device to Suite 110 and we will enter the card number online during your purchase process
- You can add everything to an online cart and provide login information for me to complete the checkout process

Amazon Orders:

Jenny and Finance Associate Director Nadine (nadinebe@design.upenn.edu) both have Amazon Business Accounts that include Amazon Prime, the fastest shipping, and automatic tax exemption. It is *highly* suggested to contact us rather than students purchasing and then being reimbursed, since **we cannot reimburse sales tax on Concur reimbursements.**

Food Orders:

The same will apply as online orders, or you can place the order with the restaurant and I can call them separately with the card to charge. Please confirm they can charge with the cardholder not present on pickup/delivery. Sales tax can be reimbursed on food orders on Concur reports, however please only use this as a last resort.

On Campus Events

Please coordinate room rental, event setup, including bartender service and tables/chairs you may need, with the Facilities department.

Please contact Facilities at wsd-operations@design.upenn.edu or visit Meyerson Room G-29.

Catering (Large Events)

We strongly encourage you to use a vendor registered with the Catering@Penn program.

Here's how to search for a caterer:

- Please visit <https://cms.business-services.upenn.edu/purchasing/making-purchases/find-a-supplier/caterers.html>
- Scroll to the bottom of the page to filter by catering type and vendor classification (small business, Minority owned, local to West Philadelphia, etc)
- Please contact the caterer to discuss your event and request a quote, then forward the estimate to Jenny. I will process a purchase order against which the caterer will invoice.

Alcohol

University policy prohibits reimbursement for alcohol purchased out of pocket.

Do not purchase alcohol out of pocket for events

*Please contact Jenny about any alcohol needs you may need **before** initiating any purchases to verify alcohol can be paid for at your event, confirm if any additional staffing or approval needs are in place, etc.*

- Please note that bartenders are required for all student events that include alcohol. When coordinating the event logistics with Facilities/G29, please ask for a quote for the total bartender cost and factor that into your overall event expenses.
- Wine/spirits must be ordered from Specialized Wine & Spirits. To obtain a list of available wines/spirits, please email Carl Zahn: carlzahnjr@gmail.com Please then forward the list to Jenny once you've made your selections.
- Beer/hard seltzers must be ordered from Springfield Beverage Distributor. Please log into the Penn Marketplace with your PennKey and password and scroll to Springfield Beer Distributor. You can browse available beverages in the Marketplace but you must call Springfield (215-546-7302) to place the order. Please forward Jenny the order so she can create a purchase order.

Reimbursement for out-of-pocket purchases

Occasionally, you may need to make last-minute purchases when our office is unavailable to assist.

- The person who made the purchase should please email Jenny Thuman so I can assist with reimbursement through Concur Expense.
- **Sales tax is not reimbursable on supply/goods purchases**
- Sales tax can be reimbursed for restaurants/food purchases
- Do not pay individuals for services. Please notify Jenny/Finance so we can ensure they're paid correctly according to labor/tax laws and University policy.
- Alcohol purchases cannot be reimbursed, whether purchased from a brick and mortar store, or at restaurants as part of a meal.

Concur Log-in page (click the Concur logo):

<https://cms.business-services.upenn.edu/penntravel/expense-report.html>

Club Trips

Please notify the Finance office as soon as your group starts planning a trip.

- We will need to know the destination and number of attendees.
- Groups are expected to make themselves aware and abide by all state, local, tribal, and territorial government restrictions in the destination and upon return to Penn's campus, which may include quarantine and/or COVID-19 testing.
- Groups must also follow local directives regarding social distancing, face coverings, and other health and safety precautions.

Tour buses are available for day trips (for example, through Philadelphia Trolley Works).

Lyft passes are available for local trips. The group is still responsible for the cost, but they are pre-paid through the university, so out of pocket costs would not be incurred, and they can apply to all students of the club. Contact Jenny to arrange this option.

If you do not use a Lyft pass, please save your paid receipt and submit a Concur Expense report. Please contact Jenny for assistance with Concur reports.

If driving a personal vehicle or renting a car, the driver must be in compliance with the university's Driver Safety Fundamentals. PLEASE NOTE: this course is temporarily inactive, as it migrates to a new program. In lieu of completing the course, you must request a TEMPORARY WAIVER of the requirement until the new course has been implemented.

Please send your request for temporary waiver to: doftraining@pobox.upenn.edu and CC pdpo@design.upenn.edu. You will receive a follow-up email confirming the waiver, and that you will continue to be in compliance with University [Financial Policy #2357](#) and/or [Financial Policy #2607.1](#)

Once the new driver safety program is available in Workday Learning, you will receive an email advising you the new driver safety program is available and the temporary waiver of the training requirement will be expiring. You will have 30 days from receipt of the email notice to complete the new driver safety program and fill the training requirement.

Additional information regarding car travel:

- Reimbursement for personal vehicle mileage, tolls, and parking can be submitted through Concur.
- Gasoline is not reimbursable when driving a personal vehicle but is reimbursable when driving a rental car.

Rental cars must be booked with Penn's corporate discount with [Enterprise/National](#) to ensure proper rates and insurance are included.