



03/16/2021

Dear Club and Organization Leaders,

UC Merced has transitioned to a new purchasing system for the entire campus, [CBS2](#). With that, we have seen extreme delays in processing your club or organization's purchasing. Continue to submit your purchase requests via [CatLife](#), under your club's finance page. Our current [purchase timeline](#) is not up to date with what we are currently experiencing, please expect delays. We recommend submitting any purchase requests you have at least **2-3 weeks early**, in order to get them in time for your club and organization event/program.

If you have any questions or concerns regarding purchasing for your club or organization, please reach out to us at [clubsandorgs@ucmerced.edu](mailto:clubsandorgs@ucmerced.edu) and [osifrontdesk@ucmerced.edu](mailto:osifrontdesk@ucmerced.edu).

If you need a refresher on purchasing guidelines, policies, and procedures please review the [RCO Finance and Purchasing Workshop](#). We provided this to our clubs and organizations as part of their annually required trainings in Fall 2020.

If your club has any questions regarding ASUCM funding, please email ASUCM at [asucmtreasurer@ucmerced.edu](mailto:asucmtreasurer@ucmerced.edu).

Please let us know how we can continue to support your clubs and organizations during this time. Do not hesitate to reach out to us via e-mail at [studentinvolvement@ucmerced.edu](mailto:studentinvolvement@ucmerced.edu) or [clubsandorgs@ucmerced.edu](mailto:clubsandorgs@ucmerced.edu) with questions or concerns.

Sincerely,  
Office of Student Involvement

**Timeline and procedures for Purchasing through Office of Student Involvement (OSI) 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 OSI 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://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.
5. All travel expenses are suspended for Fall 2020. All lodging and travel (ground and air) will not be approved.

Type of Purchase:	Time need to process	Next steps
Declining Balance Card requests	5 - 7 business 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)	5 - 7 business 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 business days	Submit PO request. (See frequently used vender list on OSI Website under resources.)
Purchase request involving a "new" vendor	1-2 weeks	Submit PO request in CatLife with vendor information. OSI 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 -10 business days	Submit PO request in CatLife, when approved contact the OSI Business Center for further instructions.
Purchase request involving campus recharge units Police or Facilities	2 - 4 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 OSI Business Center. When possible please check in with OSI before using your own money, we may have a better way to purchase. <b>Any reimbursement over \$200.00 must be pre-approved.</b>
Purchase request for travel reimbursements	Submit no later than 3 weeks of travel	Submit PO request in CatLife and bring in original receipts to OSI 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 form 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