

## **FORM AND APP USAGE GUIDELINES**

Unless otherwise noted the most recent copy of each of these forms can be located on the Purchasing Department website located at:

<https://www.wcsu.edu/purchasing/forms/>

### **Disbursement Forms - \*\*revised 3/24**

Used for:

Personal refunds/reimbursements

Food reimbursements for food purchased off campus by individuals (for Sodexo please use Food Service Policy Form)

\*To authorize payments for PSA/Honorarium (please see updated form on the Purchasing Department website) Should only be submitted after services are rendered.

After appropriate signatures are obtained, please forward original documents to the AP Office. If you have any questions, please call (203) 837-8378.

### **PSA/Honorariums - \*\*Revised 3/24**

Used for:

- Lecturers
- Entertainers
- Speakers
- Training sessions

These forms need to be submitted **two weeks** prior to an event.

Requests for individuals require a W-9 be submitted with your request.

Any current/retired State Employee are only eligible for up to a \$99 reimbursement annually.

### **Purchase Requisitions - \*\*Revised 2/26/24**

Used for:

The acquisition of goods and services,  
Memberships/Subscriptions/Licenses

After appropriate signatures are obtained send the requisition along with any supporting documentation to [purchasing@wcsu.edu](mailto:purchasing@wcsu.edu). The Purchasing Department will not accept hard copies via inter-office mail.

Appropriate signatures from the Financial Managers should be the electronic digitally verified signature whenever possible. There is no need to send a copy of the purchase requisition to the Accounts Payable Department.

## **Travel Authorization Form**

### Used For:

- Seminars
- Conferences
- Workshops
- Tickets – i.e., shows, museums, event tickets
- Conference Registrations
- Athletic Team Trips
- College Fair Registrations/tables
- Online Web conference registration/payments – where no travel is involved

Please use the Travel App

<https://www.wcsu.edu/travel/travel-authorization/>

## **Mileage Reimbursement Form**

### Used For:

In-State mileage/submitted monthly.

Completed forms are sent to the Travel Office.

<https://www.wcsu.edu/travel/mileage/>

## **Pre-Auth App**

The Pre-Auth App is available on the Purchasing Department website (under forms) and will require you to login to complete.

### Used For:

- All contracts
- Facility Use Agreements
- Venue Rentals
- IT Hardware and Software Purchases and Renewals
- Certificate of Insurance (COI) Requests

If this is a new vendor you will be asked to supply a W-9 for the business/person.

Complete all fields in the request – **Do not Insert “See Attached”**

Attach a copy of the current contract for the vendor if it is a renewal.

Do not submit the purchase requisition in the Pre-Auth app. A purchase requisition will need to be submitted after the contract has been approved and processed.

Please note that all W-9's must be for the current calendar year.

COI's must be made out to both the State of CT as well as Western Connecticut State University.

Please make sure that each attachment in the app is labeled appropriately.

## **Food Service Request App **\*\* NEW\*\*****

Used for:

- Food Requested through Sodexo only

There is a new App that should be used going forward, paper requests are no longer accepted. If you are submitting the form with-in the required two weeks' notice you must attach a copy of the late submittal form in Section 8 below. Forms without the late submittal paperwork will be returned until properly completed.

Food Service requests now include a check box for food trucks and/or off campus food providers.

## **Food Service Late Submittal Form - **\*\*Revised 5/24****

All food service orders that are received outside of the two-week window require a late submittal form be attached to the request in the Food Service Request App. Requests without the late form will be returned to the requestor for completion.

Please note that all late food service requests will incur a three percent late fee on their order. Late submittal forms will require a verified digital signature from the person who has Budgetary approval authority for the department.

## **WB Mason**

WB Mason is the State of Connecticut office supply contract vendor. All orders for office supplies can be placed online through <https://wbmason.com/>.

To set up your department account please email [Victoria.Seunarine@wbmason.com](mailto:Victoria.Seunarine@wbmason.com). You will provide her the following information:

First and last name  
E-mail address  
Ship to Address  
Phone Number

Once your account has been approved you will receive a welcome email. Items with red checks are the contracted items available for ordering. Items of a personal nature are restricted and should not be purchased using state funds. You will be responsible for placing the account distribution codes on your office supply online order.

\*All items must be delivered to your campus office\*.  
Please do not go to Staples or use Amazon for routine office supplies.

## **P-Cards**

Effective **July 1, 2024**, all cardholders will be responsible for loading their receipts and coding their transactions in the JP Morgan SmartData system. The Purchasing Department will no longer accept

paper copies of receipts. Additional instructions on how to do this will be available on the Purchasing Department website.

All cardholders are strongly encouraged to register their cards in the JP Morgan SmartData system. This will allow JP Morgan to reach out to the cardholder via text or email of any suspicious activity on your account. Finally, if you are traveling and going to be using a university issued p-card you are urged to contact JP Morgan ahead of time and tell them you will be traveling.

### **Reference Material**

How to clear your browser cache - [How to Clear Your Browser Cache – WCSU Support](#)

This link will show you step by step how to clear your browser cache on a variety of devices including Google Chrome, Windows, Microsoft Edge, Firefox, and Safari.

Use this link to create a digital signature on a MAC and Windows Device.

How to Create Digital Signatures in Adobe Acrobat - [How to Create Digital Signature in Adobe Acrobat – WCSU Support](#)