HOW TO ENTER AN SAR

Step 1: To create a new SAR [Student Activity Request], the form needed to initiate a procurement for a Goods/Service or for Travel. Click the green “CREATE NEW SAR” button on your dashboard.

Dashboard: Test Organization

Step 2: Select the type of SAR you require

Remember: Travel SAR’s are only if select organizational members are going to travel. These trips must be budgeted in your organizational budget and approved before the Budget and Appropriations Committee.

Select a Type of SAR

The decision at this point is whether you are creating a Student Activity Request (SAR) to buy goods and services or whether you want to create a Travel Activity Request (TAR).

Anything that is not related to travel where you leave the city of Gainesville and UF property is procured under the “Goods and Services” section of the DocuSign system.

Goods and Services

Travel
Step 3: Once you select a type of SAR a drop down with information will emerge. Please read the information as it contains important tips and guidelines according to the type of SAR that you will be submitting. After reading the information go ahead and click “Get Started”.

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Select a Type of SAR

The decision at this point is whether you are creating a Student Activity Request (SAR) to buy goods and services or whether you want to create a Travel Activity Request (TAR).

Anything that is not related to travel where you leave the city of Gainesville and UF property is processed under the "Goods and Services" section of the DocuTraq system.

Goods and Services

To use Activity and Service Fire funds a Student Activity Request (SAR) must be created AT LEAST 10 BUSINESS DAYS prior to event/project start date.

Examples of which Line item to use when completing the process:

- Honorariums – When you plan on paying a person(s) for performance of a service, such as a speaker, musical performance or a professional service provided by someone with special skills and talents. NOTE: REQUESTS TO PAY HONORARIAL/CONTRACTS MUST BE SUBMITTED A MINIMUM OF ONE (1) MONTH IN ADVANCE OF THE PERFORMANCE DATE!
- Office Supplies – material used in a student organization office.
- Program Supplies – material used in the course of putting on an event/project.
- Advertising – flyers, materials bought to promote an event/project.
- Awards – can only be spent on awards given to UF students who have won a competition.
- Food – maximum amount of $2.00 per UF student eating the food for any given event/project.
- Outside revenue – these are funds raised by an organization through donations and fund raising events. These funds are the ONLY funds you can use AFTER a procurement has occurred. The only restriction on this funding source, is they cannot be used to procure alcohol for human consumption.
- Reimbursements – When you plan to use your own money and ask to be reimbursed for the expenditure. Remember you are the vendor in this case, not the establishment from which you bought the material. Examples of reimbursement expenditures: Facebook Ads; Wal-Mart purchases, food, decorations for an event, etc. If this is the first time you are asking to be reimbursed, you will need to add yourself to the vendor file. USE YOUR UFID number in this system, do not use your SSN.

Step 4: After clicking “Get Started” you will then be asked to confirm that is is fact the type of SAR you would like to submit.
Step 5: Information page in which you will input the contact info for the SAR. Please remember whoever is listed as the contact person of the SAR will receive notifications during the processing of the SAR. This is the person our office will contact if any questions arise regarding the SAR submitted.

NOTE: The fifth line down on this page asks for the Budgeted Project number. Your budget lists projects/events in a numeric sequence. The Budgeted Project Number is found at the top of each project in the budget. This number is **REQUIRED** in order to match the SAR to a budgeted request.

Step 6: Next you will see the vendor selections page in which you will select the vendor from the system that you will be purchasing or acquiring your goods and/or services from. If the vendor for your SAR is not in the system please select “Add New Vendor” and add them.

Note: Please be aware that you will need the vendor’s name, address, phone number, e-mail and their Fed number or UFID.

Note: Please do not put your UFID with someone else’s name. This only leads to confusion and can slow down the process.

Note: For reimbursement SAR’s, the person being reimbursed is the Vendor, not the store from which he/she bought the material.
Step 7: Once you have selected a vendor you will be able to add the items you wish to purchase. To do so click “Add item”
Step 8: A new feature of Docutraq is to display the available balance by budget lines for your group. The SAR will charge whatever line you pick provided there is sufficient funds left in that line.

Once you have selected your line you will then fill out the information regarding what you are purchasing. Please complete each box to ensure the request can be processed.
Step 9: Once you add your item you will have the option to add additional items. The additional item(s) may be directed against any Line Number that is active in your budget. Simply use the drop down box to change Line Number.

Once you have added all the items you wish to include in the SAR, click the “Next” button to review your SAR before submitting.

Step 10: The last page you will see before submitting your SAR will be the review page where you can do a last minute check on all information. Once you have reviewed all the information you can click the submit button.
One of the new features to Docutraq is the verification page that tells you the system is processing the information provided. This verification page will show that you have necessary funds and the SAR is complete.

Congratulations! You finished an SAR. You can now view a PDF version of your SAR to keep for your records. We highly recommend that you either save it or print it just in case any problems should arise in the future.
IMPORTANT
SAR INFORMATION

➢ THE FIRST AND MOST IMPORTANT RULE? YOU CANNOT SPEND ACTIVITY AND SERVICES FEES WITHOUT THE PRIOR APPROVAL OF THE STUDENT BODY TREASURER!
  o Meaning: If you have not received an email that the Student body Treasurer has approved your SAR you CANNOT UNDER ANY CIRCUMSTANCES spend money!!
  o If you spend money before approval, SG Finance is NOT LIABLE for the payment to a vendor. YOU ARE!!

➢ SARs MUST BE received by the SG Finance a minimum of 10 Business Days before the good or service requested is needed.
  o SAR’s that require CONTRACTS MUST BE in the Finance office at least 30 Days BEFORE the speech / performance. Performers that are traveling from overseas require up to 16 weeks’ notice.
    ▪ When do I need a contract?
      • All personal services provided to a Student Government funded organizations must be contracted prior to the rendering of those services.
      • Following examples all require a contract:
        o Lectures
        o Speakers
        o Bands
        o Performers of any kind [Ex: DJ’s; instructors; Judges; etc.]
        o Professional fees
        o Honorariums etc.
        o Bounce houses

➢ If you need to be reimbursed, all receipts must be itemized and turned in within 30 days of date of purchase. All receipts for a given SAR must be turned in at the same time, and the individual being reimbursed must bring in their own receipts.

➢ Frequently Asked Questions:
  1. What are line items in an SAR?
o Programs: Anything that does not fall within any of the categories listed below.

o Advertising: Aimed at the Student Body.
  • Fliers.
  • Facebook Ads; twitter etc.
  • Tarps/banners.
  • newspaper ads.

o Food: food that will be served at your event.
  • If at the Reitz Union it MUST BE ORDERED THROUGH Classic Fare.
  • All events serving food must be advertised and served buffet style.
  • Maximum amount is $3.00 per person.

o Copies: All copies must be made through the SG Copy Center.
  • Funds are controlled by SG Administration see Student Government front desk to place an order for copies.

o Awards :
  • No more than $30 per award.
  • Given to individuals participating in some sort of competition.

2. Deposits:
   o **ALL CHECKS MUST BE MADE OUT TO UNIVERSITY OF FLORIDA.**
   o Deposits are taken from 8 to noon and 1 p.m. to 3:30 during normal business days.
   o All funds must be turned in to SG Finance within 15 calendar days from date on the check.

3. CANCELLATIONS FEES: Policy is NOT to pay cancellation fees for the Reitz Union meeting rooms or ballrooms using A&S funding. They must be charged to Outside Revenue (OSRV).

4. Travel:
   o Expenses paid by UF PCARDS from other UF departments will not count as an expense to you and SG Finance will not reimburse another UF department.
   o Receipts MUST be brought to SG Finance by person being reimbursed.
   o Once Expense Report is completed, an original signature from traveler is REQUIRED before the report can be forwarded to UF Travel for payment.
### 5. CONTACT INFO:

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<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Responsibilities</th>
<th>Email</th>
</tr>
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<tbody>
<tr>
<td>Student Body Treasurer</td>
<td></td>
<td>Budgets, 800 codes</td>
<td><a href="mailto:treasurer@sg.ufl.edu">treasurer@sg.ufl.edu</a></td>
</tr>
<tr>
<td>Business Manager</td>
<td>Stanley Beckerdite</td>
<td>Budgets, 800 Codes, Docutraq, Travel</td>
<td><a href="mailto:sbeckerdite@sg.ufl.edu">sbeckerdite@sg.ufl.edu</a></td>
</tr>
<tr>
<td>Sr. Fiscal Assistant</td>
<td>Michele Williams</td>
<td>Docutraq, Deposits, Budgets, Travel</td>
<td><a href="mailto:mwilliams@sg.ufl.edu">mwilliams@sg.ufl.edu</a></td>
</tr>
<tr>
<td>Office Assistant</td>
<td>Chris Burdsall</td>
<td>Paying Vendor Invoices, Blue Slips</td>
<td><a href="mailto:cburdsall@sg.ufl.edu">cburdsall@sg.ufl.edu</a></td>
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