PROCEDURE

Effective Date: November 1, 2015
Revised: January 17, 2023
Authority: POL-U5348.16 Purchasing Food and Beverages Policy
Approved By: Pete Heilgeist, Director of Procurement

See Also:

<table>
<thead>
<tr>
<th>Document #</th>
<th>Document Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRM-U5348.16A</td>
<td>Food and Beverage Approval (FBA) Form</td>
</tr>
<tr>
<td>PRO-U5348.16B</td>
<td>Purchasing Food From External Vendor with P-Card</td>
</tr>
</tbody>
</table>

PRO-U5348.16 PURCHASING FOOD AND BEVERAGES THROUGH UNIVERSITY CATERING SERVICES

Action by: Department

1. **Ensures** purchase of food meets criteria based on the type of funding used.
   
   a) **Selects** funding options in Section 1 of the **Food and Beverage Approval (FBA) e-Form** to view the required criteria.

2. **Obtains** a “quote” from **University Catering Services**.

   **Important**:
   
   - Do not submit the final catering services order form until all approvals to purchase food (using the Food and Beverage Approval e-Form) are received.
   - The cost quote is needed for the approval form.

3. **Ensures** the cost meets per diem requirements if using Chart 1 funds. If it exceeds per diem limits, the order must be adjusted to reduce the cost or Chart 2 funds must be used to fund the difference.

4. **Follows** any additional requirements stated on the form (e.g., obtain required permits if serving alcohol.)

5. **Submits** a **Food and Beverage Approval (FBA) e-Form** to first approver listed in the routing section of the form.

   **Important**: The submitter will receive a confirmation email after submitting the FBA form. The submitter is to note the form # provided in the confirmation. This form # will be required for the catering order form in the billing section.

6. **Monitors** the routing status of the form using the link received in the confirmation email. The final approver needed (before a catering order can be submitted) is the designated VP delegate listed in the routing instructions.
Action by: Approvers

7. **Follows** approval and routing requirements on the routing instructions. Final approver is Accounts Payable.

Action by: Department

8. After receiving all required approvals, **finalizes** order through University Catering Services.

Action by: University Catering Services

9. **Processes** order.

10. **Sends** invoice to the department and Accounts Payable.

11. **Provides** catering services.

Action by: Department

12. Following the event, **reconciles** expenditures and ensures per diem charged to funding sources approved in the FBA form.

Action by: Accounts Payable

13. **Matches** invoice to FBA form.

14. **Contacts** department and/or University Catering Services to resolve any issues.

15. **Pays** invoice.

16. **Locks** FBA form which will automatically notify the department bill has been paid.