

Standard-Level Entertainment \$5,000 or less:

Pre-Event:

1. For all Requisitions:

- a. **Lead time:** A week; minimum 2 days
- b. **Name CruzBuy cart:** UnitName.EventName.EventDate
e.g. AIRC.StudyJam.120914
- c. **Can have multiple vendors on one requisition for each event**
- d. **If there are multiple requisitions for an event**
Name CruzBuy carts like this:
UnitName.EventName.EventDate.1, UnitName.EventName.EventDate.2, etc.
- d. **If Event total will be over \$5,000 ****
Email Katy with the main cart name in the subject header (ie AIRC.StudyJam.120914)
And let her know (so she doesn't approve your req by mistake!)

**** (Units are responsible for monitoring event costs, and informing Katy and Melody if an event goes over \$5,000)**

2. Requisition Review:

- a. **Daily:** 8-9am and 4-5pm
CruzBuy will be checked for requisitions & approved if they adhere to policy
Katy will email you after 9am or by 5pm if corrections or more info are needed
- b. **If there is an issue:**
Katy will email a CruzBuy comment to: the requestor, approver, and RS team lead
If you can make corrections without a kickback, instruction will be in the comment
If it has to be kicked back, explanation and instruction will be in comment
- c. **Rush requests:**
Call AND email Katy (katye@ucsc.edu; x9-2789)

Post-Event:

1. ERFs

- a. **Non-Procard:**
Enter ERF information on Google Doc: ERF Tracking
Mail the signed ERF to: Katy Elliott, MS: Career Center
Review: ERF will be reviewed, signed, and returned to your unit within 1 month of receipt
ERFs with reimbursements will be done the day they are received
Please call or email if you need ERF returned sooner
Questions/Corrections: You will be emailed within a week
ERF will be signed and returned within 1 week of issues resolved
- b. **Procard:**
Mail the ERF and receipt copies w/ERF# on receipts: Katy Elliott, MS: Career Center
Review: ERF will be reviewed, signed, and returned to your unit within 1 week of receipt
Questions/Corrections: You will be emailed within three days
the goal is to make corrections within a week of receipt

****All paper documents will be date-stamped the day they arrive; that is the date we will use when following the timeline.**