

**SOAR, Media and CAD Financial Timelines**

1. Purchases for **events** must have a completed Event Proposal prior to request.
2. All financial forms due by to SOAR by 1pm for processing.
3. Top Level Event Proposal Request (>\$4,999.99) require a minimum 4 weeks prior to initiating purchases.

<b>What are you trying to purchase?</b>	<b>Which Form(s) do you need to fill out?</b>	<b>Completed form due # days/weeks in advance.</b>	<b>Next Steps</b>
Event supplies, prepared food, t-shirts, flyers misc. supplies etc.	Purchase Request	6 business days	Pick up completed purchase order and shop. Return receipt within 2 business days.
Facility Fees: Dining Hall, Event Centers etc.	Event Proposal	6 business days	None
DJs, Performers, Other services	Purchase request, Quote, 204, (After Event) Request for Payment	11 business days	After services are completed turn in invoice or a Request for Pay form
Rental of equipment and tech support on campus	Media Services Quote, Purchase request	11 business days	Pick up and return equipment (or meet media staff if delivered)
UCSC vehicle rental	Vehicle Request.	11 business days	Schedule Driver's Training with your Advisor
On campus services i.e. rental of tables, chairs	Purchase Request	11 business days	None
On campus catering services	Talk with your Adviser 4 weeks in advance	11 business days	Turn in receipt
Reimbursement for <b>supplies</b> you bought out of pocket.	Direct Pay Form: Supply Reimbursement format, 204, original itemized receipts. Must have signature of non-payee org signer.	4-6 weeks (to receive check)	Check will be mailed to you or directly deposited
Reimbursement for <b>food and/or entertainment</b> supplies	Entertainment Reimbursement Form***, 204, original itemized receipts. Must have signature of non-payee org signer.	4-6 weeks to receive check	Check will be mailed to you or directly deposited
Travel i.e. off campus vehicle rental, hotel payments, conference fees, etc.	Travel Advance Request (TAR) filled out with advisor, 204, list of travelers	6 weeks	Meet with your Advisor
Charter buses	Talk with your advisor 6 weeks in advance	4 weeks	Confirm with SOAR and Charter bus companies that all information is accurate and buses are reserved
Security for events (Dances etc.)	Event Proposal	4 weeks	None

\*\* Adding a student as a vendor or adding a new off-campus vendor to the UCSC system requires a 204 form that will add a minimum of 6 business days processing time to any transaction. \*\*\***Food and Entertainment Related Supplies:** Include food, beverages, sales tax, gratuity, and service and delivery charges for each food and/or beverages expense. Also include linens, decorations, flowers, and other supplies that are involved with the serving of food and/or beverages (e.g. ice, utensils, plates, cups, tables, and chairs).