

1. Overview

Leadership has approved this protocol to serve the USF Community during the COVID-19 crisis and the California Shelter-in-Place mandate. Off-campus deliveries are intended to support online instruction, infrastructure, health, and safety. Please include ACTIVITY CODE CV0019 in the FOAPAL string on all COVID-19 related orders.

The procedure outlined below are aligned to the **USF Procurement Policy**, ensuring University contract pricing and additional value-added benefits are applied to all USF expenditures.

HTS does not allow users to update delivery addresses to a non-USF delivery address because it is structured to follow Generally Accepted Accounting Principles (GAAP), procurement best practices, and internal audit rules. Through our partnership with B&H Foto & Electronics, Inc., Purchasing and Ancillary Services (PaAS) has developed a workaround.

In this protocol, the HTS requisition is used to check budget availability and capture all levels of ORG approval, including restricted commodities and Grant expenditures. In addition, the requisition will capture the COVID-19 needs justification and off-campus delivery information.

Please note that with COVID-19 related off-campus deliveries, approvals have changed. All expenditures, regardless of dollar amount, must be approved by the business unit's Budget Manager as verification of essential need and to confirm the order is permitted for off-campus delivery.

When the approval workflow is complete, a PaAS team member will place the order and will process the transaction using a COVID-19 Special Project p-Card. The expense will reconcile in Concur charging the requesting department's FOAP directly. After the expense is reconciled, PaAS will "REJECT" the requisition in HTS to prevent further processing.

Processing time on these order types varies, as there are dependencies (i.e., budget availability, multiple approval queues, etc.) that must be satisfied before the request can be processed.

If additional guidance is required, please send email to purchasing@usfca.edu.

Please refer to additional SNOW KB articles for step-by-step help for COVID-19 Purchases for Off-Campus Deliveries, Central Receiving Package Pick-Up, and On-Campus Deliveries.

KB13865	Amazon Direct Off-Campus
KB13949	Amazon, Certain Media Types or Gift Cards Only
KB13950	HTS Orders Redirected to Off-Site Location
KB13952	Central Receiving, Package Pick-Up Procedures
KB13953	On-Campus Office Deliveries

2. Instructions

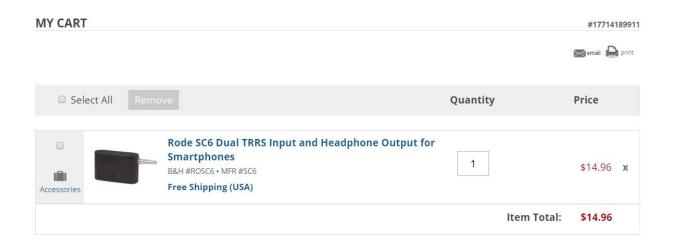
Step 1: In HTS, enter B&H PunchOut store.



Step 2:

Place item(s) in the cart.

• Please submit one cart per delivery recipient.

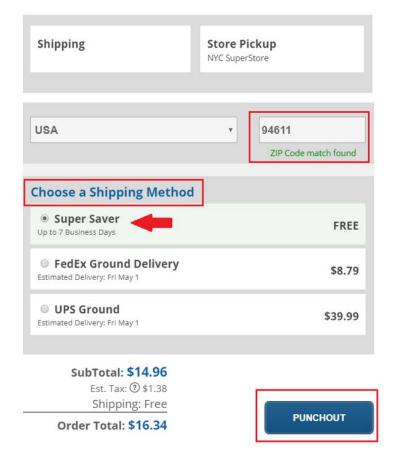


Step 3:

Insert the recipient's **zip code** to view delivery options.

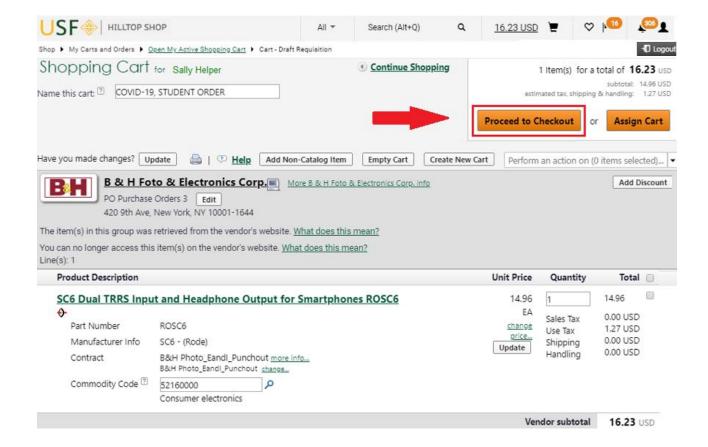
• Choose a delivery method. Please consider a delivery method upgrade. The order cannot be released to the vendor until all HTS approvals levels are posted. In addition, all vendors and shipment carriers are experiencing delays.

Selecting **Punchout** will return to HTS.



Step 4:

In HTS, review order and PROCEED TO CHECKOUT



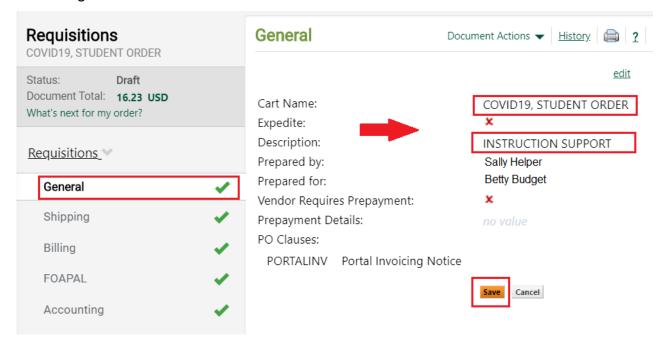
Step 5:

Edit **GENERAL** Section:

• Name Cart: COVID-19, [state purpose]

• **Description:** HOME DELIVERY TO: [state role, i.e., Faculty, Student, or Staff]

SAVE changes.





COVID-19 ORDERING Protocol:

B&H FOTO, Direct Off-Campus Delivery – KB13967

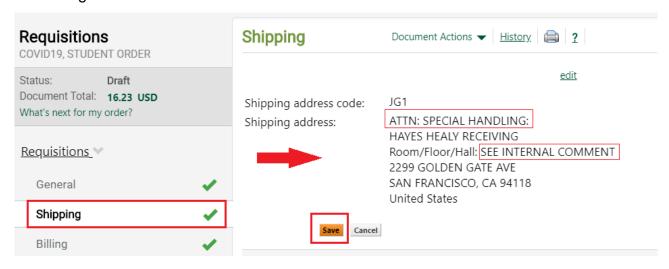
Step 6:

Edit SHIPPING Address

• ATTN LINE: SPECIAL HANDLING

• ROOM/FLOOR/HALL: SEE INTERNAL COMMENT

SAVE changes.



Step 7:

Provide FOAPAL

 Please include activity code CV0019 in the FOAPAL string on all COVID-19 related orders.

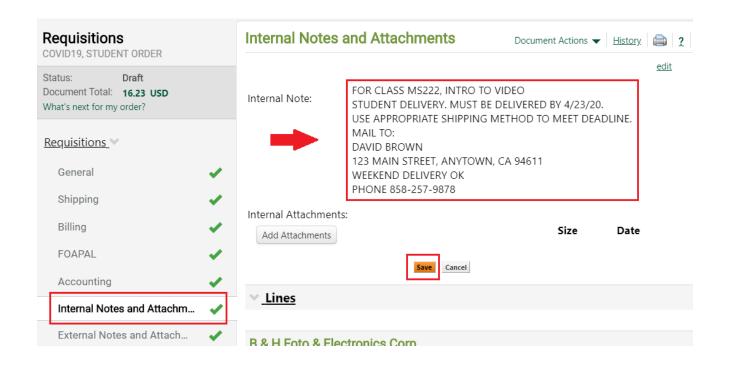


Step 8:

Add INTERNAL COMMENT:

- PROVIDE NEEDS JUSTIFICATION: (Example below indicates class name and class number.)
- PROVIDE RECIPIENT'S DELIVERY ADDRESS & TELEPHONE NUMBER (A telephone number for delivery purposes.)
- **PROVIDE SPECIAL DELIVERY INFORMATION:** (Example indicates to choose the shipping method that may get the package to the student on time.)

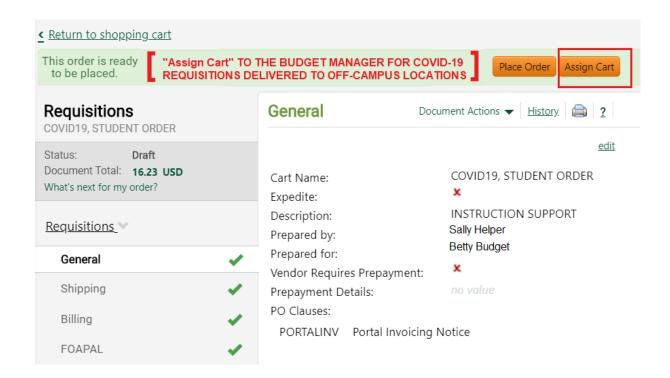
SAVE changes.



Step 9:

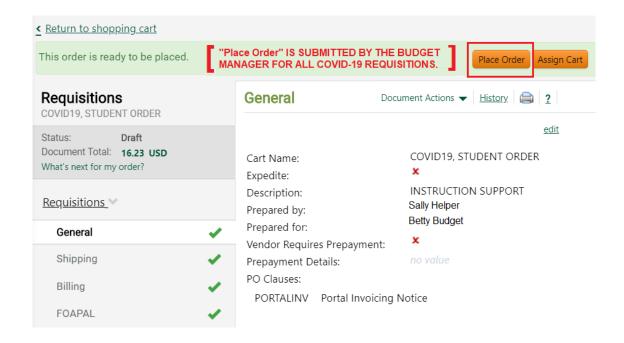
Select ASSIGN CART and assign to the business unit's Budget Manager.

• **IMPORTANT:** During the COVID-19 pandemic, all expenditures, regardless of dollar amount, must be approved by the Budget Manager as verification of essential need and to confirm that the order is permitted for off-campus delivery. If this step is skipped, a PaAS team member will return the cart to the Requestor. The Requestor will have to resubmit by **ASSIGNING** the cart to the **Budget Manager**.



Step 10:

Budget Manager places the order.



When the requisition reaches the "**PROCUREMENT APPROVAL**" queue, a PaAS team member will process the requisition outside of HTS. Please refer to **Overview** section of this KB Article to review remaining internal PaAS processes.

