

Ordering from La Casa

General Guidelines:

- La Casa Latina only works with non-SAC recognized student groups; all SAC recognized student groups should work with their [assigned counselor](#)
- For food & supplies: Submit your order at least 10 **business days** in advance.
 - (Ex. If event is September 18th, 2024, submit order by September 4th, 2024)
- For Merch: Submit your order at least 30 days (about 4 and a half weeks) in advance
- When inquiring on placing an order, please use [La Casa Latina's Request form](#)
- Purchase Orders ("POs") are preferred
- University Purchasing Card ("PCard") is case-by-case approval and should be considered the last option
- Concur reimbursements are highly discouraged
 - Please reach out to La Casa Latina prior to using your personal funds (your personal debit/credit card) for student group expenses.
 - Sales tax is considered non-reimbursable for nearly all expense types
 - A Concur expense report should be submitted **within 10 days of the transaction**, or within 10 days of the return of the trip (if a travel expense), per Penn policy. Completing and submitting the expense report within two weeks of the expense transaction date is recommended for quicker reimbursements.
 - All expense reports must be accompanied by required **itemized receipts** and other supporting documentation. This includes the student group name, detailed descriptions of the business-related activities, meeting or conference agendas, and any other supporting materials necessary to justify the expenses.
- To qualify for an order request, you must provide proof of funding prior to ordering
 - Please visit [Student Activities Council](#) funded site for more information on how to apply for funding to support your event
 - [Funding guidelines and resources](#)
 - [Funding sources Resource Table](#)
 - [Common Funding Application](#)

Using a PO Supplier:

General notes:

- Preferred method of ordering
- Use only with approved Penn Suppliers
- The University of Penn provides a [supplier search](#) system for approved suppliers
- La Casa Latina has a curated list of commonly used suppliers
 - [La Casa Preferred Supplier List](#)

Step-by-Step Process

- 1) Notify La Casa Latina of the initiation of an order request.
- 2) Show proof of funds: Student group budget OR funding award letter, **we will not move forward with any requests without proof of funding**
- 3) Submit La Casa Latina Smartsheet and notify La Casa Latina of the sent request
 - a) Provide a business justification for the purchase.
- 4) Participate in completing the order (e.g., call the supplier).
- 5) Obtain invoice and send to the La Casa Latina Program Coordinator (elsiel@upenn.edu)
- 6) La Casa Latina submits a 'payment request' for the supplier

- a) An invoice/quote/estimate from the vendor is needed to submit request, **no invoice/quote/estimate = no payment request**
- b) A PO vendor will need to send their final invoice to Penn Accounts Payable once the goods/services are provided. The PDF must reference the original PO# on the invoice. If emailed, Penn AP will match the invoice to our PO and the processing time is between 3 to 5 business days. Once matched, the payment terms will begin. Payment terms vary depending on the commodity/vendor type but generally adhere to Net 10, Net 30, or Net 45 terms. Vendors must use electronic invoicing methods, such as the Penn Marketplace portal or email, to expedite this process. If the vendor has entered direct deposit information in their profile, payment will be electronic. If not, the payment will be via physical check.
 - i) **Net 10:** Payment will be scheduled 10 days after Penn AP matches the final invoice to the purchase order
 - ii) **Net 30:** Payment will be scheduled 30 days after Penn AP matches the final invoice to the purchase order
 - iii) **Net 45:** Payment will be scheduled 45 days after Penn AP matches the final invoice to the purchase order
- 7) Once you receive the PO# from Casa Latina, contact the supplier to complete the payment using the provided email prompt:

Thank you so much for catering to this order and supporting our event with your services. We truly appreciate your contribution!

Please use PO# _____ for this order.

At your earliest convenience, please log into your Penn portal account and use the PO flip function to convert the PO into an invoice. Alternatively, you can send the final invoice as a PDF attachment to Penn Accounts Payable at poinv@upenn.edu. The invoice must include: the PO# referenced, the invoice date, an invoice number, and the total amount due.

Please let me know if you have any questions or concerns. Thank you!

- a) If issues arise, share the following PDF link to suppliers
[Supplier PO-Flip functionality PDF](#)
- b) Contact La Casa Latina if a vendor mentions that their invoice was rejected by Penn AP
- 8) Create an expense report (requirements may vary by funding board)
 - a) Fill out expense report based on specified requirements
 - b) Description / Justification of purchased items
 - c) Applicable Budget Code
 - d) [Itemized receipt](#)
 - i) A detailed receipt that lists and breaks down every individual cost.
 - e) Submit expense report to the corresponding funding source and CC the relevant contacts:
Jan Kee Scott: keedzh@upenn.edu - Manager, Financial Service Center
Leon Malloy: lmalloy@upenn.edu - Associate Director, Finance & Operations
Elsie Lopez: elsiel@upenn.edu - La Casa Latina Program Coordinator
 - i) If applicable, this step is crucial to ensure a transfer of funds back to La Casa from awarded funds

Using a PCard:

General Notes:

- Case-by-Case approval
- Cannot be used for deposits
- Low dollar, one-time purchases from non-approved suppliers
 - Single transaction limit of \$1000
- No third-party purchases (e.g., Uber Eats, Door dash, Grubhub, Venmo)
- Only boxed/individual meals (e.g., Pizza, Bento box, Sandwich etc.). **NO CATERING** (i.e. nothing that comes in trays/buffet style) for food purchases.
- The University of Pennsylvania is a 501(c)(3) tax-exempt educational entity. Purchases related to student activities should be tax free when requesting invoices/estimates/or quotes from vendors prior to purchase
 - Please note it's recommended to contact the vendor to confirm they can honor our tax-exempt status prior to placing an order.
 - Please contact La Casa Latina if a vendor requests a tax-exemption certificate to confirm our tax status.

Step-by-step

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- 3) Submit La Casa Latina Smartsheet and notify La Casa Latina of the sent request
 - a) Provide a business justification for the purchase.
- 4) Participate in completing the order (e.g., call the supplier).
- 5) La Casa Latina contacts the supplier to complete tax-free payment
- 6) Obtain the invoice/receipt and send it to the La Casa Latina Program Coordinator (elsiel@upenn.edu).

Suppliers for grocery/supply needs:

La Casa Latina has been able to establish tax exempt accounts with certain suppliers for grocery needs, please use the following suppliers for grocery related needs

- [Walmart](#)
 - Select items add to your car
 - Email PDF to La Casa Latina Program Coordinator (elsiel@upenn.edu)
 - **Please make sure all items and grand total are displayed in PDF.**
- [Amazon](#)
 - Create a shopping list
 - Email the list to La Casa Latina Program Coordinator, Elsie Lopez at elsiel@upenn.edu. Make sure that your email includes the following:
 - Include student group name
 - purchase justification
 - when the order is needed by/event date
 - delivery address
 - you can use La Casa Latina: 3601 Locust walk, suite G-12, Philadelphia PA 19104

Suppliers for Merch:

- [Preferred Licensed Supplier List](#)
- [Student Brand Guidelines](#)
- [Branding Standards](#)
- Student questions, please contact: [Katie Hanlon Bonner](#), Office of Student Affairs.

FAQ/Considerations:

- What is a PO/PO Supplier?
PO stands for Purchase Order, a legal document sent to request a product or service.
PO Supplier: Approved suppliers that have been vetted, and approved to do business with Penn
- Student Activities Council (SAC) recognized groups, can contact Jan Kee Scott: keedzh@upenn.edu - Manager, Financial Service Center, for purchasing inquiries.
- Apply for funding well in advance of your event (at least 6 weeks prior to program date); Here is a list of funding sources and common app (insert links)
- Fundraising on campus?
 - [Fundraising Guidelines](#)
 - **Approval:** All fundraising activities must be pre-approved by the relevant University authorities.
 - **Checks:** Checks for group activities must be made payable to the Trustees of the University of Pennsylvania and properly endorsed.
 - **Deposits:** Funds for group activities must be deposited in a University account and not used to pay expenses directly.
 - **Non-University Charities:** Checks should be sent directly to the charity.
 - E-mail La Casa Latina Program Coordinator, Elsie Lopez at elsiel@upenn.edu prior to fundraising for more information
- Don't see a Supplier you'd like to work with, send us an e-mail with the following information:
 - What kind of services will be provided? (Such as catering, photography, etc)
 - Contact First and Last Name:
 - Contact Email Address:
 - Contact Phone Number:
 - Company Name:
 - Company Street Address:
 - Company City/State/Zip:
 - Type of Good/Service to be provided:
 - Is this request for an Independent Contractor (an Individual/sole proprietor or single-member LLC providing services)?

Dr. Krista L. Cortes – Director, La Casa Latina: kristacortes@upenn.edu

Roseilyn Guzman – Associate Director, La Casa Latina: roseilyn@upenn.edu

Elsie Lopez – Program Coordinator, La Casa Latina: elsiel@upenn.edu