

<b>Office of the University Union Policies and Procedures</b>	Subject: Reserveable Space Policies & Information	Reference: V.A.
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## RESERVATION PROCESS

Reservations for the University Union may be made in person, or by calling 465-2200 (ext. 28), between the hours of 8:00 am and 4:30 pm. The reservations area is located on the third floor of the University Union (UU 306).

Once the reservations has assessed your room needs and checked availability of rooms, a reservation will be made for your program based on availability. At this time, inform the reservations of the date, time, number of people attending, desired set-up, and any special needs for your reservation. Special needs could include: technical equipment, food, personnel, etc...

A confirmation sheet will be printed out at this time for you, as well as for our files, and if making any special requests, a copy will be sent to the appropriate area (catering, technical etc.). Upon receiving the confirmation, please check to make sure that all the information is correct. If not, inform the reservations to make the appropriate changes.

If catering is needed for your event, you will need to contact the catering service at 465-2200 (ext. 31) at least two weeks prior to your event. Last minute requests may not be honored.

Please call 465-2200 (ext. 28) with any updates and changes in your event needs. On the day of the event if anything is needed, please contact the Main Desk (465-2400) and a member of the Union Services Response Team will assist you.

If your group desires alcohol, an alcohol request form (see Alcohol Waiver Request Form---section III.B.) needs to be filled out at least two weeks prior to your event. All alcohol related events on our campus need to be approved by the Executive Director of Business Enterprises and Project Administration, or University Union Director for Union events. Forms may be obtained from the reservations.

If your event will continue past the normal building hours, special permission will need to be obtained from the Assistant Director of Building Services. The reservations will assist you with this process and inform you of any additional charges this might involve.

Off-campus groups are charged a rental fee for the use of University Union rooms. This includes normal set-up and tear-down times. If a customer requests a set-up that is extremely labor intensive, there may be additional charges.

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Anyone selling something in the University Union must be sponsored by a University group, or a rental fee will be charged. If your group is having a vendor sell items for your group and will be paying the group a percentage of the sales, a Vendor/Student Contract (see section VII.I.) must be filled out and turned into the Office of Student Life.

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PROCEDURES FOR CUSTOMERS MAKING A RESERVATION IN THE  
UNIVERSITY UNION WITH CHARGES INVOLVED

1. Reservations for rooms or promotional spaces can be made with the assistance of the reservations staff, located in the Office of the University Union in UU 306. A person can stop in and meet with the reservationist, or call 465-2200, ext. 18. (Refer to Reserveable Space Rental Policy for information on rental rates and chargeable users.)
2. The reservationist requests the date, number of people, type of set-up required, a title, the name of the sponsoring organization, a name, phone number, and other details essential to the program. The reservationist enters the data, and finds an appropriate room that meets the event's needs.
3. For details that are chargeable, the customer will be notified at the time of the booking. (If rental of the Phoenix ABC, Nicolet Room, or Niagara AVC is involved, the customer will receive a tentative confirmation listing the charges.) Many reservations will require a deposit which will be on the confirmation (Refer to Single Program/Large Event Reservation Policy for details about deposit and cancellation policies). Once the deposit is received, the reservation is confirmed, and a new copy will be sent to the customer.
4. Customers requesting food or refreshments at their events should be directed to the University Dining Service to arrange the details.
5. Following a Union event, a customer will receive an invoice or Charge Back Form for rental equipment, and misc. if applicable, from the University Union. Payment to the University Union needs to be sent directly to the Bursar's office for external customers. If food and beverages are requested at an event, a separate invoice will go out to the customer from the University Dining Service. Payment for food and beverages needs to be made directly to the University Dining Service.

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## INVOICING PROCEDURES FOR UNION EVENTS

1. A designated reservationist produces a billing worksheet from the Event Management System showing the previous week's events that have charges involved.
2. This worksheet is reviewed by the Union Event Coordinator, who makes changes if necessary. Some of the details change the day of the event, and need to be adjusted. (i.e. the operations staff may make a last minute adjustment on rooms, or equipment may malfunction, etc, and charges need to be adjusted.) The Union Event Coordinator identifies which are external and internal billings.
3. Once this is complete, the billing worksheet is returned to the reservationist. Invoices are produced for each reservation indicated on the billing worksheet through the Event Management System.
4. The reservationist bills in two different ways. If the customer is an internal customer, and making payment through a budget transfer, a University of Wisconsin-Green Bay Charge Back Form is processed through the Event Management System. If the customer is an external customer, an External Invoice is generated through the Event Management System.
5. The reservationist assigns UDDS codes for credited services for all University Union Charges on both types of invoices: These need to be listed on the invoices for proper crediting to occur:
  - a. Room Rental, equipment rental, Personnel support-General Operations-128-D-05-1000
  - b. Ticket Sale Services-Main Desk-128-D-05-1600
  - c. Balloons and Helium-Corner Store-128-D-05-1600

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### PROCEDURES FOR DOING AN INTERNAL INVOICE

If the group is internal (University Related) and the charges will be paid through a budget transfer, then a Charge Back Form is produced. The following procedures should be followed to create this form.

1. Special letterhead paper is placed in the LaserJet printer to produce the Charge Back Form (See example A)
2. The reservationist accesses the EMS software under billing, opens invoicing, types in the reservation number, and presses the preview button. A preview invoice will appear on the screen. After reviewing, if correct, press final, and then print. An invoice will be produced onto the Charge Back letterhead paper. The reservationist completes the appropriate UDDS codes to be charged and credited.
3. The Charge Back Form is signed by the Director of the University Union or assistant Director-Building Services. (See example B)
4. The reservationist makes five copies of the signed Charge Back Form. Two copies are sent to Sandy Johnson in the Business Office in CL 835, who completes the budget transfer. One copy is sent to the customer with a letter, (see example C) explaining the process and showing the customer the actual charges that the customer will be billed for. One copy goes to the University Union Event Coordinator and is filed with the billing worksheet.
5. The customer, upon receiving the invoice, calls the Union Event Coordinator if there are any discrepancies. If changes are applicable, the reservationist will notify the Business Office, and send corrected copies to everyone listed above.

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## PROCEDURES FOR EXTERNAL INVOICING

If the event is paid for out of private money, then an external invoice is prepared. The following procedures should be followed to create an external invoice.

1. Special external invoice letterhead paper needs to be in the LaserJet printer to produce this type of invoice. (See example D)
2. The reservationist accesses the EMS software under billing, opens invoicing, types in the reservation number, and presses the preview button. A preview invoice will appear on the screen. After reviewing, if correct, press final to see the final invoice on screen. Press the print option, and an invoice will be produced on the external invoice letterhead paper.
3. The reservationist makes a line through the EMS invoice number so that the Bursar's Office can assign the appropriate number to the form, and completes the appropriate UDDS code(s) to be credited on the bottom of the form.
4. The reservationist makes a total of six copies of this invoice. (See example E for an example of completed external invoice) Five copies of the invoice go to the Bursar's Office, and one copy is filed with the billing worksheet in the Union Event Coordinator's Office.
5. The Bursar records the invoice, assigns a number to it, and keeps one copy for it's record keeping. Two copies are sent to the customer, one copy to the University Union Financial Services Coordinator, and one copy goes to the University Union Event Coordinator (to replace the file original).
6. The Bursar's monthly accounts receivable statement is reviewed, and the reservationist will credit the appropriate accounts with payments within the EMS System. This removes invoices from the aging account list.
7. Periodically, all past due invoices are reviewed and re-visited by the reservations staff.