

Buying and Payment Guide Summary:

Rev: 09/11/2017

Below is a summary of the types of purchases appropriate for each procurement or payment method. For a more comprehensive description of the “Best” method and corresponding policies, info, and links, please reference the full [Buying and Payment Guide](#).

UShop Punch-Outs

Required for UShop available catalogs. Preferred electronic method for purchases:

- Office Supplies
- Medical Supplies
- Lab Supplies or Equipment
- Janitorial Supplies
- Computers or Computer Components
- Server Class Systems or Components
- Networking Equipment

UShop Specialty Forms

Preferred method for:

- Chartwells Catering
- Chartwells Walk-in Dining
- Chartwells Dining Dollars/Meal Plans
- Recurring Lease Payments
- Internal University Suppliers

UShop Purchase Request

Preferred method for purchases of goods and services including but not limited to:

- Advertisements (Programs and Billboards)
- Alcohol (non-denatured ethyl)
- Awards-Plaques, trophies, etc.
- Books
- Chemicals
- Coffee Services
- Computer Hardware/Software
- Controlled Substances (Drugs, chemicals, gas, etc.)
- Custodial Services
- Equipment Rentals and Purchases
- Fabricated Equipment
- Catered Food and Meals
- Foreign Purchases
- Furniture
- Maintenance—Equipment
- Printing and Copying Services
- Radioactive Isotopes
- Remodeling, Repair or Alterations of University physical facilities
- Rentals (events, meeting space)
- Rentals (real property, office space, storage)
- Reprint fees
- Signage
- Subscriptions
- Supplies (lab supplies or Office Supplies)
- Transcription Services
- Uniforms
- Waste Disposal
- Water Services—Bottles or other
- Workstations/Cubicles

PCard

University Corporate Credit Card used for small dollar purchases. See PCard Restricted list for more details. PCard purchases include but are not limited to:

- Small Dollar Goods (<\$5,000)
- Printing and Copier Services
- Conference Registration
- Advertising
- Software License Renewals
- Repairs and maintenance to Non-individuals
- Meals with PCard Exemption
- Subscriptions
- Freight
- Waste Disposal
- Chartwells

ePayment Request

ePR are preferred for payment allowed by policy including but not limited to:

- Awards
- Books/Textbooks (Purchased on behalf of a student(s))
- Donations
- Freight
- Guest Lecturers
- Honoraria
- Research Participants
- Insurance (non-University employee)
- Legal Fees
- License Renewal Fees (Professional)
- Medical Services (outside of U of U Depts)
- Memberships and Academic Dues
- Performers/Entertainers/DJ's (individuals and groups)
- Refunds
- Social Dues
- Utility Bills (monthly charges for Gas, Elec. Etc.)
- Fellowship/Traineeship

Keep it on Campus

Whenever possible, take advantage of the goods and services available on campus. Contact the seller to understand their preferred method of payment.

- Campus Store
- Copier Fleet Services
- Facilities Management
- Facilities—Motor Pool
- General Counsel
- General Stores
- The Point
- Positively U
- Univ Conference & Event Management
- University Print and Mail Services
- University Surplus and Salvage
- Prepaid Airfare-Onsite Travel Agents

Scholarship Administration

Payments for tuition and fees of Scholarships and Awards to enrolled & Matriculated University of Utah students.

Payroll

Payments for wages, services, and awards to employees.

Travel & Reimbursement Services

Travel is 100 miles or overnight. General Reimbursements processed through Travel and Reimbursement Services.

- Prepaid Airfare
- Hotel & Conference Prepayments
- Travel Cash Advances

This document uses the following images to help guide University personnel regarding preferred buying and payment methods.

NOTE: UShop is the University's online marketplace, and the suppliers, commodities and processes available to users within the market place have been designed to provide campus users with the most appropriate blend of pricing and efficient processes.

Preferred Methods:

- **UShop Punch-Out Catalog Purchases** = this is the preferred and most efficient procurement method on campus. Any purchases that can be made through a punch-out, should be completed through the punch-out catalog process.
- **Non-Catalog request for Purchase Order (UShop)**= preferred method for the purchase goods and services regardless of dollar amounts. The requisition to PO to Invoice to Payment process should be utilized when ever possible, especially in lieu of paying invoice for goods and services on direct payment methods. Additionally the Non-Catalog request should be used whenever repeat business from the supplier is expected.
- **Renewal PO (UShop)** = Should be used for recurring services and monthly bills.
- **PCard** = preferred method for Business Meals and purchases with suppliers where repeat business is not expected. Additionally preferred whenever in-person transaction is necessary and within the \$5,000 procurement threshold.
- **ePR** = preferred method for specified, direct payment types such as Guest Lectures, Utilities, Membership Dues, Refunds, etc. See the full payment guide for more details.
- **Keep it on Campus** = There are departments on campus that provide goods and services to help other departments save money. Take advantage of purchasing on campus whenever possible. Contact the seller to understand their preferred method of payment.
- **Travel & Reimbursement Services** = Travel expenses for University Employees are required to be processed through the Travel Department. General reimbursements should be infrequent and utilized only when absolutely necessary.

Buying and Payment Guide Key:

Best—Signifies the best payment method available. Best payment methods should always be favored for processing.

A—Allowable payment method. There may be one or more allowable payment method(s) for a payment category. Allowable payment methods are preferred except in instances where a "Best" method is indicated.

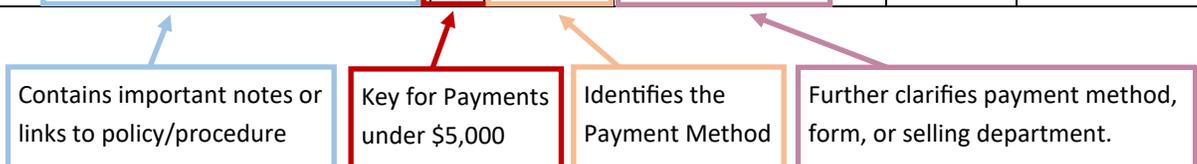
Sole—The method outlined is the ONLY method allowed.

⊘ —This method is prohibited by policy for the instance outlined.

! —Method is acceptable, but is not the most efficient or most cost effective method. Users are encouraged to use preferred methods and support P2P objectives of low contracted pricing, more efficient processes and consistent transparency.

Reading the Buying and Payment Guide:

Payment Category	Important Notes/ Requirements	Under \$5,000.00			Over \$5,000.00		
Honorariums	University Policy 3-062	Sole	ePR	Individuals	Sole	ePR	Individuals
Human Subjects and Research Participants	See procedure for additional requirements. Payments to Human Research Participants	A	ePR	Study Participants	Best	ePR	Study Participants
		Best	LPC	Limited Purchase Check	⊘	LPC	Limited Purchase Check
		!	Petty Cash (<\$100)		⊘	Petty Cash (<\$100)	



Payment Category	Important Notes/Requirements	Under \$5,000.00				Over \$5,000.00		
Academic Dues		Refer to "Memberships/Academic Dues"						
Advance Deposits - including conference venues, restaurants, and catering	Preferred method for advance deposits are based on the total cost of the event/conference/food purchase, including the deposit amount. Must be purchased for a legitimate business purpose and must be allowed by the particular funding source. In addition, when University staff members are involved, purchases should be prudent and infrequent so as to satisfy IRS requirements that there was no taxable benefit to the employee. University Travel Policy 3-030 University Travel Procedure 3-100A	A	UShop	Catering or Conference Purchase Request	Best	UShop	Catering or Conference Purchase Request	
		A	PCard		⊗	PCard		
Advertisements- Programs and Billboards	University Rule 3-100D	A	UShop	Purchase Request or Purchase Request Quick Order	Sole	UShop	Purchase Request or Purchase Request Quick Order	
		A	PCard	Must have PRN number prior to posting.	⊗	PCard		
Advertisements- Employee Recruitment	University Policy 5-102	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order	
		A	PCard	Must have PRN number prior to posting.				
Airline Tickets		Refer to "Travel" section						
Alcohol (non-denatured ethyl)	University Rule 3-100E - See Section III.B.2.d of Policy (General Stores) PLEASE NOTE: All requests must go through General Stores.	Best	UShop	Ethyl Alcohol Form	Best	UShop	Ethyl Alcohol Form	
		A	Keep It On Campus	General Stores	A	Keep It On Campus	General Stores	
Alcoholic Beverages	Not allowed using state appropriated funds. Any purchase of alcoholic beverages for entertainment or recruiting purposes requires Dean or Director's written approval. As with all transactions, refreshments must be purchased for a legitimate business purpose and must be allowed by the particular funding source. University Regulations Library 3-031	Best	PCard	With Business Meal or alcohol authorization and compliance with department guidelines. Contact Office of General Counsel for restrictions for serving at events on campus.				
		A	UShop	Catering or Conference Purchase Request				
Animals (Live Animals)	The purchase of live animals for research or to put on display require the approval of the director of the Office of Comparative Medicine. University Rule 3-100E	Sole	UShop	Office of Comparative Medicine Order	Sole	UShop	Office of Comparative Medicine Order	
Awards-Monetary Awards for University Employee	Employee Services Awards and should be coordinated through Human Resources and Payroll. FBS Index & Glossary - Employee Awards	Sole	Payroll	Additional Compensation Form	Sole	Payroll	Additional Compensation Form	
Awards-Monetary Awards for Matriculated University of Utah Students		Sole	Scholarship Administration System		Sole	Scholarship Administration System		
Awards-Monetary Awards for non-Matriculated University of Utah Students		Sole	ePR	Student & Educational Payments	Sole	ePR	Student & Educational Payments	
Awards-Plaques, trophies, etc.		A	UShop	Purchase Request or Purchase Request Quick Order	Sole	UShop	Purchase Request or Purchase Request Quick Order	
		A	PCard		⊗	PCard		
Bank Payment		Sole	ePR	Payment Type: Misc., Business Purpose: Bank Payment	Sole	ePR	Payment Type: Misc., Business Purpose: Bank Payment	
Blood Donors	W-9 is required for these payments. IRS Form W9	Best	LPC	Limited Purchase Check	⊗	LPC	Limited Purchase Check	
		A	ePR	Payment Type: Misc., Business Purpose:	Best	ePR	Payment Type: Misc., Business Purpose:	
Books/Textbooks- Purchased on behalf of a student(s)	Textbooks purchased on behalf of matriculated University of Utah Students must be reported through the Scholarship Administration System.	Sole	ePR	Student & Educational Payments	Sole	ePR	Student & Educational Payments	
Books/Textbooks- Purchased on behalf of a faculty member or for a specific course		Best	UShop	Punch-Out Catalogs, if available	Best	UShop	Punch-Out Catalogs, if available	
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order	
		A	PCard		⊗	PCard		

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Capital Equipment (costing more than \$5,000)	University Policy 3-040 University Policy 3-100D University Policy 3-045				Best	UShop	Punch-Out Catalogs
					A	UShop	Purchase Request or Purchase Request Quick Order
Chemicals	Non-denatured ethyl alcohol is restricted and should be ordered through General Stores only. See also: Alcohol, Controlled Substances, Gases, Radioactives. University Rule 3-100E	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	Keep It On Campus	General Stores	A	Keep It On Campus	General Stores
Coffee Services		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	UShop	PO Renewal Form	A	UShop	Renewal
		A	PCard		⊗	PCard	
Commission		Sole	ePR	Payment Type: Misc., Business Purpose: Commission	Sole	ePR	Payment Type: Misc., Business Purpose: Commission
Computer Hardware	Purchases greater than \$1,000 are insurable assets and should be recorded in the appropriate expense account.	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
		A	Keep It On Campus	Campus Store	⊗	Keep It On Campus	Campus Store
Computer Software- including Programs and Licensing	The purchase of computer software, or other goods or services which may involve sensitive personal data (social security numbers, etc.) or information protected by HIPPA, must be purchased via Requisition, regardless of cost. Office of Software Licensing	A	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
		Best	Keep It On Campus	Office of Software Licensing	⊗	Keep It On Campus	Office of Software Licensing
		A	Keep It On Campus	Campus Store	⊗	Keep It On Campus	Campus Store
Concert/Lecture Series Performer	Payments to agencies for performers and guest lecturers. (There should be an invoice.)	Best	ePR	Guest Lecturer/Performer	Best	ePR	Guest Lecturer/Performer
		A	PCard	To Corporations only.	⊗	PCard	
Conference, Seminar, Workshop-Registration Fees/Tuition--Off Campus/involving travel greater than 100 miles from campus.	University Policy 3-030	A	Travel		A	Travel	
		A	PCard		⊗	PCard	
Conference, Seminar, Workshop-Registration Fees/Tuition--Off Campus/local (less than 100 miles from campus).		A	Travel		Best	Travel	
		Best	PCard		⊗	PCard	
		A	ePR	Fees/Associations/Dues	⊗	ePR	
Conference, Continuing Education, Seminar, and Workshop- Registration Fees and Regular, On Campus Tuition and Fees	All payments crediting charges assessed to student accounts through Income Accounting and Student Loans, and Continuing Education, should be paid through Scholarship Admin.	Sole	Scholarship Administration System		Sole	Scholarship Administration System	
Conference venue/event, Seminar, Workshops-Hosting or planning	University Conference & Event Management	Best	Keep It On Campus	University Conference & Event Management	Best	Keep It On Campus	University Conference & Event Management
		A	PCard		⊗	PCard	

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Consultants and Independent Contractors--Corporations or LLC	Must provide a completed Independent Contractor Agreement University Rule 3-100D University Policy 3-111	A	UShop		Sole	UShop	Purchase Request or Purchase Request Quick Order
		A	ePR	Independent Contractor/Consult	⊗	ePR	
		⊗	PCard		⊗	PCard	
Consultants and Independent Contractors--Individuals	Must provide a completed Independent Contractor Agreement and an Employee/Independent Contractor Classification Checklist if the vender is an individual. University Rule 3-100D University Policy 3-111	A	UShop		Sole	UShop	Purchase Request or Purchase Request Quick Order
		A	ePR	Independent Contractor/Consult	⊗	ePR	
Construction		Refer to "Remodeling, Repair, or Alterations"					
Controlled Substances (Drugs, chemicals, gas, etc.)	A DEA license may be required for these purchases. University Rule 3-100E	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
Custodial Services	If the vendor is an individual, must provide a completed Independent Contractor Agreement and an Employee/Independent Contractor Classification Checklist. University Policy 3-111	A	UShop	Purchase Request	A	UShop	Purchase Request
		A	UShop	PO Renewal Form	A	UShop	Renewal
		Best	Keep It On Campus	Facilities Management	Best	UShop	Purchase Request or Purchase Request Quick Order - Monthly Payments
Deposit Refunds		A	Petty Cash (<\$100)		⊗	Petty Cash (<\$100)	
		Best	ePR	Refunds	Best	ePR	Refunds
Donation	NOTE: Donations over \$1,000 require a VP's signature. University Rule 3-100E	Sole	ePR	Royalties & Funding	Sole	ePR	Royalties & Funding
Employee Incentives or Refer to "Gifts", "Flowers" Gifts		Refer to "Gifts", "Flowers"					
Equipment Purchases (Insurable \$1,000~\$4,999)	When the purchase of insurable equipment has been recorded in the financial system, the department will attach the appropriate inventory tag to the equipment and maintain records of the location and other pertinent information within the department. A physical verification of insurable equipment should be conducted by the department or unit every two years. University Rule 3-100D University Policy 3-041	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Equipment Rental--One time rental/payment (operating lease--not a capital lease agreement)	University Policy 3-110	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	Keep It On Campus	Campus Recreation, Facilities Management, Motor Pool	A	Keep It On Campus	Campus Recreation, Facilities Management, Motor Pool
		A	PCard		⊗	PCard	
Equipment Rental--One time rental/payment (operating lease--capital lease agreement)	University Rule 3-100D	Sole	UShop	Purchase Request or Purchase Request Quick Order	Sole	UShop	Purchase Request or Purchase Request Quick Order
Equipment Rental--Multiple payments for the same equipment (based on cumulative cost per year--not a capital lease)	University Rule 3-100D	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
		A	Keep It On Campus	Copier Fleet Services (copier lease agreements)	A	Keep It On Campus	Copier Fleet Services (copier lease agreements)

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Fabricated Equipment	Requisitions routed through Property Accounting University Policy 3-040 University Policy 3-041	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		!	PCard	Need approval from Property Accounting	⊗	PCard	
		A	Keep It On Campus	Facilities Management	A	Keep It On Campus	Facilities Management
Fellowships		Refer to "Scholarships/Fellowships"					
Flowers--For Non-University Employees, special event décor or for landscaping	University Expenditure Guidelines	A	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		Best	PCard		⊗	PCard	
		!	ePR	Supplier Invoice (<\$5,000)	⊗	ePR	
Flowers--For University employees (funeral/condolences only)	Special approval from Purchasing Card required. See 'Rules regarding Meals, Awards & Gifts' and University Expenditure Guidelines	A	UShop	Purchase Request or Purchase Request Quick Order			
		Best	PCard				
Food and Meals (non-Travel)--Business Meals, Office Functions	Food and meals must be purchased for a legitimate business purpose. In addition, when University staff members are involved, purchases should be prudent and infrequent so as to satisfy IRS requirements that there was no taxable benefit to the employee. Not all Purchasing Cards allow for the purchase of food/meals. Contact the Purchasing Card Program (581-7241) to determine if your department approved this feature on your PCard. Catering (Total cost including deposit). For on-campus departments, please contact the seller to understand their preferred method of payment. University Policy 3-030 University Policy 3-031	A	UShop	Purchase Request or Purchase Request Quick Order; Catering or Conference Purchase Request	Best	UShop	Purchase Request or Purchase Request Quick Order; Catering or Conference Purchase Request
		Best	PCard	With Business Meal Exemption	⊗	PCard	
		A	Keep It On Campus	The Point, Chartwells, The View, Hospital Catering	A	Keep It On Campus	The Point, Chartwells, The View, Hospital Catering
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
Food and Meals (non-Travel)--Entertainment/Recruitment	Any purchase of food or meals for entertainment or recruiting purposes requires Dean or Director's written approval. In addition, when University staff members are involved, purchases should be prudent and infrequent so as to satisfy IRS requirements that there was no taxable benefit to the employee. Alcohol may not be purchased with state appropriated funds. See 'Rules regarding Meals, Awards & Gifts' and University Expenditure Guidelines University Policy 3-031	Best	PCard	With Business Meal Exemption	⊗	PCard	
		A	Keep It On Campus	The Point, Chartwells, The View, Hospital Catering	A	Keep It On Campus	The Point, Chartwells, The View, Hospital Catering
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
Foreign Purchases	Customs or tariff charges may need to be paid. University Rule 3-100E	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		!	PCard	If less than \$1k and no customs clearance required.	⊗	PCard	
Freight	If items were purchased on a purchase order then pay the freight on the PO.	Best	ePR	Utilities/Freight	Best	ePR	Utilities/Freight
		A	PCard		⊗	PCard	
Furniture	Facilities' review and approval are required for purchases totaling more than \$5000. University Policy 3-205	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
		A	Keep It On Campus	University Surplus and Salvage	A	Keep It On Campus	University Surplus and Salvage
Gases		Refer to "Controlled Substances"					

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Gifts/Gift Cards--For Non-University Employees (donors, University relations, etc.)	All gift purchases must be documented with the name of the individual(s) receiving the gift and their relationship to the University (if a non-employee). Also see Human Subjects section. See 'Rules regarding Meals, Awards & Gifts' and University Expenditure Guidelines Payments to Human Research Participants	A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		Best	Keep It On Campus	Campus Store or Positively U	Best	Keep It On Campus	Campus Store or Positively U
		A	PCard	With Gift Card Exemption	⊘	PCard	
Gifts/Gift Cards--For Employees	Gift cards to employees for any amount must be reported to Tax Services and purchased using University Funding. See 'Rules regarding Meals, Awards & Gifts' and University Expenditure Guidelines	Best	Payroll	Additional Compensation Form	Best	Payroll	Additional Compensation Form
		A	Keep It On Campus	Campus Store or Positively U	A	Keep It On Campus	Campus Store or Positively U
Guest Lecturers	Must complete a Guest Lecturer/Performer agreement. FBS Index & Glossary - Guest Lecturer/Performer Agreement	Sole	ePR	Guest Lecturer/Performer	Sole	ePR	Guest Lecturer/Performer
Honorariums	University Policy 3-062	Sole	ePR	Payment Type: Misc., Business Purpose: Honorarium	Sole	ePR	Payment Type: Misc., Business Purpose: Honorarium
Human Subjects and Research Participants	See procedure for additional requirements. Payments to Human Research Participants	A	ePR	Study Participants	Best	ePR	Study Participants
		Best	LPC	Limited Purchase Check	⊘	LPC	Limited Purchase Check
		!	Petty Cash (<\$100)		⊘	Petty Cash (<\$100)	
Insurable Equipment		Refer to "Equipment"					
Insurance (non-University employee)		Sole	ePR	Payment Type: Misc., Business Purpose: Insurance Premium	!	ePR	Payment Type: Misc., Business Purpose: Insurance Premium
Lab Supplies		Refer to "Supplies"					
Leases		Refer to "Rentals/Leases"					
Legal Fees	Payment of legal fees need to be authorized by General Counsel. University Policy 3-100	Best	Keep It On Campus	General Counsel	Best	Keep It On Campus	General Counsel
		A	ePR	Payment Type: Misc., Business Purpose: Legal Services	A	ePR	Payment Type: Misc., Business Purpose: Legal Services
License Renewal Fees - Professional	Including Professional, Institutional, and Drug (DEA) Licensing	Best	ePR	Fees/Associations/Dues	Best	ePR	Fees/Associations/Dues
		A	PCard		⊘	PCard	
License Renewal Fees - Software	Software	Refer to "Software"					
Lodging for Conferences		Refer to "Travel"					
Maintenance-Equipment--Includes Maintenance Agreements and One-Time Repairs	Prepare a requisition if the repair involves a machine that has hazardous or radioactive materials. See Policy 3-205 regarding grounds and property repairs. Only one payment is allowed per PR. University Rule 3-100D University Policy 3-205	A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		Best	UShop	PO Renewal Form	Best	UShop	Renewal (for annual recurrence)
		A	Keep It On Campus	Facilities Management	A	Keep It On Campus	Facilities Management
		A	PCard	For expenses less than \$5k in a Fiscal Year	⊘	PCard	
Medical Services (outside of U of U Departments)		A	ePR	Payment Type: Misc., Business Purpose: Medical Services	A	ePR	Payment Type: Misc., Business Purpose: Medical Services
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
Medical Services (between U of U Departments)	University Departments paying for medical services performed by other University Departments should pay for these via eJournal.	Sole	eJournal		Sole	eJournal	
Medications/Vaccinations		Refer to "Controlled Substances"					

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Memberships and Academic Dues	New memberships must be approved by the cognizant dean, director, or designee, or, in the case of the University Hospital personnel, by the hospital administrator. Subsequent payments for renewing memberships already approved as described above can be approved in writing by the member's supervisor. University Rule 3-100E	Best	ePR	Fees/Associations/Dues	Best	ePR	Fees/Associations/Dues
		A	PCard	New Memberships must show required approvals at the time of audit.	⊘	PCard	
Mileage Reimbursement-Non-University Employee	Private Auto Mileage Rates	Best	Travel		Best	Travel	
		A	ePR	Non-employee Reimbursement	A	ePR	Non-employee Reimbursement
Mileage Reimbursement-University Employee	Any trip overnight or more than 100 miles away from campus is considered Travel. Private Auto Mileage Rates University Policy 3-030-Travel	Best	Travel	More than 100 miles away from campus	Best	Travel	More than 100 miles away from campus
		A	ePR	Less than 100 miles away from campus	⊘	ePR	
		A	Petty Cash (<\$100)	Less than 100 miles away from campus	⊘	Petty Cash (<\$100)	
Moving Expenses-Moving Companies (Household or Office)	Guideline G5-4031 Moving Allowances IRS Publication on Moving Expenses	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	ePR	Employee Reimbursement	⊘	ePR	
Moving Expense Reimbursements	Guideline G5-4031 Moving Allowances IRS Publication on Moving Expenses	A	Travel	For University Employees (uID Assigned)	A	Travel	For University Employees (uID Assigned)
		A	ePR	Employee Reimbursement	A	ePR	Employee Reimbursement
Patent Expense		Sole	ePR	Royalties & Funding	Sole	ePR	Royalties & Funding
Performers/Entertainers/DJ's (Individuals and Groups)	Must use Guest Lecturer/Performer Agreement.	Sole	ePR	Guest Lecturer/Performer	Sole	ePR	Guest Lecturer/Performer
Printing and Copying Services	Print and Mail Services	A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	Keep It On Campus	University Print and Mail Services	A	Keep It On Campus	University Print and Mail Services
		A	PCard		⊘	PCard	
Printer/Copier purchases or Service Contracts	Copier Fleet Department	A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		Best	Keep It On Campus	Copier Fleet Services	Best	Keep It On Campus	Copier Fleet Services
		A	PCard		⊘	PCard	
Radioactive Isotopes	University Rule 3-100E	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
Registrations		Refer to "Conferences Seminars, Workshops, Tuition"					
Reimbursements, Non-travel	University Policy 3-010 University Rule 3-010A	!	ePR	Employee Reimbursement/non-Employee Reimbursement	⊘	ePR	Over \$5,000 not allowed
Rentals/Lease (real property, office space, storage)	Consult with Real Estate Administration first. University Policy 3-110	Sole	UShop	Purchase Request or Purchase Request Quick Order	Sole	UShop	Purchase Request or Purchase Request Quick Order
Rentals (events, meeting space)	If the event is to be held at a hotel, contact the Purchasing Card Program to verify the controls on your card.	A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		Best	Keep It On Campus	University Conference & Event Management	Best	Keep It On Campus	University Conference & Event Management
		A	PCard	Including deposit	⊘	PCard	Including deposit
Remodeling, Repair or Alterations of University physical facilities	Contact Campus Design and Construction University Policy 3-205 University Rule 3-100D	Best	Keep It On Campus	Facilities Management	Best	Keep It On Campus	Facilities Management
		A	UShop	Punch-Out Catalogs	A	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Repairs and Maintenance-Equipment		A	UShop	Punch-Out Catalogs	A	UShop	Punch-Out Catalogs
		A	UShop	PO Renewal Form	A	UShop	PO Renewal Form
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard	For expenses less than \$5k in a Fiscal Year	⊗	PCard	For expenses more than \$5k in a Fiscal Year
Reprint fees (manuscript and Page charges)		Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
		A	ePR	Supplier Invoice (<\$5,000)	⊗	ePR	
Research Subject and Study Participant Payments	Requires IRS Form W-9 Guidelines for Payments to Human Research Participants IRS Form W9	Refer to "Human Subjects And Research Participants"					
Restricted items as outlines in Rule R3-100E	For Non-denatured alcohol, see Alcohol (Non-denatured ethyl) DEA License or additional forms may be required. University Rule 3-100E	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	Keep It On Campus	General Stores	A	Keep It On Campus	General Stores
Royalties	Requires IRS Form W9 IRS Form W9	Sole	ePR	Royalties & Funding	Sole	ePR	Royalties & Funding
Scholarships and Fellowships for Matriculated U of U Students	The recipient does not have to teach a course, perform research for the benefit of The U, or perform other services that benefit The U. Tuition and Fees for enrolled and matriculated students cannot be paid except through SA. Please refer to the Education Payment Decision Document .	Sole	Scholarship Administration System		Sole	Scholarship Administration System	
Scholarships and Fellowships for Non-Matriculated U of U Students	The recipient does not have to teach a course, perform research for the benefit of The U, or perform other services that benefit The U. Requests for non-matriculated U of U students can be processed on a ePR when Scholarship Admin has been included as an approver. Please refer to the Education Payment Decision Document .	Sole	ePR	Scholar/Fellow/Traineeship Payment Type + completed Scholarship/Fellowship/ Traineeship Form	Sole	ePR	Scholar/Fellow/Traineeship Payment Type + completed Scholarship/Fellowship/ Traineeship Form
Seed Funding		Sole	ePR	Royalties & Funding	Sole	ePR	Royalties & Funding
Services or products provided by University faculty, staff, and employees	University Policy 5-403	Sole	Payroll	Additional Compensation Form	Sole	Payroll	Additional Compensation Form
Services-plant maintenance, etc.		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		Best	Keep It On Campus	Facilities Management	Best	Keep It On Campus	Facilities Management
Signage	University Rule 3-100D	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	Keep It On Campus	University Print and Mail Services	A	Keep It On Campus	University Print and Mail Services
		A	PCard		⊗	PCard	
Social Dues		Sole	ePR	Fees/Associations/Dues	Sole	ePR	Fees/Associations/Dues
Software	All subscriptions and cloud-based software not available from OSL should be paid for using PCard. Office of Software Licensing	A	UShop	Punch-Out Catalogs	A	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		Best	Keep It On Campus	Office of Software Licensing	Best	Keep It On Campus	Office of Software Licensing
		A	PCard	For software not sold by OSL	⊗	PCard	
Subcontracts (OSP)	OSP will initiate the request for a PO.	Sole	OSP		Sole	OSP	

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Subscriptions--Magazines, Newspapers, and Periodicals		Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Subscriptions--Internet Access to Mission Critical Applications		Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Supplies (Lab Supplies or Office Supplies)	University Rule 3-100D	Best	UShop	Punch-Out Catalogs	Best	UShop	Punch-Out Catalogs
		A	UShop	Purchase Request or Purchase Request Quick Order	A	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Student Assistance		Best	Scholarship Administration System		Best	Scholarship Administration System	
		I	ePR	Student & Educational Payments	I	ePR	Student & Educational Payments
Student Loan Payment		Sole	ePR	Student & Educational Payments	Sole	ePR	Student & Educational Payments
Study Participants		Refer to "Human Subjects and Research Participants"					
Temporary Employment Services - Agencies		Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Traineeships for Matriculated U of U Students	Payments for enrolled students cannot be paid except through Scholarship Administration. The recipient does not have to teach a course, perform research for the benefit of The U, or perform other services that benefit The U. Please refer to the Education Payment Decision Document .	Sole	Scholarship Administration System		Sole	Scholarship Administration System	
Traineeships for Non-Matriculated U of U Students	The recipient does not have to teach a course, perform research for the benefit of The U, or perform other services that benefit The U. Please refer to the Education Payment Decision Document . Traineeship Forms and Instructions	Sole	ePR	Scholar/Fellow/Traineeship Payment Type + completed Traineeship Form	Sole	ePR	Scholar/Fellow/Traineeship Payment Type + completed Traineeship Form
Transcription Services	University Rule 3-100D	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Travel Cash Advance	FBS Index & Glossary - Travel Reimbursement	Sole	Travel	Cash Advance Form	Sole	Travel	Cash Advance Form
Travel (lodging, hotels, motels, restaurants, airline tickets, etc.)	Utah state sales tax is required to be paid upfront for Utah lodging sales tax. Tax Services Dept. files a quarterly Utah State Sales Refund request. NOTE: University Guest House is allowed on the PCard. University Policy 3-030	Sole	Travel		Sole	Travel	
Travel, Local Shuttle	Local Airport Shuttle Service for non-employees (Salt Lake City)	Best	PCard		⊗	PCard	
Travel, Employee Airfare	Airfare; Reimbursements for University employees. University Policy 3-030 FBS Index & Glossary - Travel Reimbursement	Best	Travel	Use Steps 1,2,3 Airfare Forms	Best	Travel	Use Steps 1,2,3 Airfare Forms
		A	Travel	Reimbursement forms	A	Travel	Reimbursement forms
Travel, Non-Employee Airfare		Best	Travel	Use Steps 1,2,3 Airfare Forms	Best	Travel	Use Steps 1,2,3 Airfare Forms
		A	ePR	Non-employee Reimbursement	A	ePR	Non-employee Reimbursement

Payment Category	Important Notes/Requirements	Under \$5,000.00			Over \$5,000.00		
Travel, Conf. Reg.	Conference Registration University Policy 3-030 FBS Index & Glossary - Travel Reimbursement	A	Travel	Conference Payment Form	A	Travel	Conference Payment Form
		Best	PCard		⊗	PCard	
Travel, Mileage Reimbursement	Mileage Reimbursements for day trips >100 miles one-way. NOTES: A travel log is required (date, start and destination points, purpose). For mileage less than 100 miles one-way, see "Mileage Reimbursement" FBS Index & Glossary - Mileage (Personal)	Sole	Travel	Final Reimbursement Form	Sole	Travel	Final Reimbursement Form
Tuition Direct Payments	To other schools. All tuition direct payments will be reviewed by Tax Services.	Sole	ePR	Student & Educational Payments	Sole	ePR	Student & Educational Payments
Uniforms	University Rule 3-100D	Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Funds Transfer/Funding Pass-through	Funds transfers only to other external state institutions.	Sole	ePR	Payment Type: Misc, Business Purpose: Funds Transfer (3rd Party)	Sole	ePR	Payment Type: Misc, Business Purpose: Funds Transfer (3rd Party)
Utility Bills (monthly charges for Gas, Elec., etc.)		Best	ePR	Utilities/Freight	Best	ePR	Utilities/Freight
		A	PCard		⊗	PCard	
Vehicle Rentals	FBS Index & Glossary - Car Rental University Policy 3-030	Best	Keep It On Campus	Facilities Management- Motor Pool	Best	Keep It On Campus	Facilities Management- Motor Pool
		A	Travel	More than 100 miles away from campus	A	Travel	More than 100 miles away from campus
Waste Disposal		Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard	For expenses less than \$5k in a Fiscal Year	⊗	PCard	For expenses more than \$5k in a Fiscal Year
Water Services - Bottled or other		Best	UShop	PO Renewal Form	Best	UShop	Renewal
		A	PCard		⊗	PCard	
Workstations/cubicles not requiring alterations to physical facilities		Best	UShop	Purchase Request or Purchase Request Quick Order	Best	UShop	Purchase Request or Purchase Request Quick Order
		A	PCard		⊗	PCard	
Workstations with panels requiring alterations to physical facilities		Refer to "Remodeling, Repairs or Alterations of University Physical Facilities"					