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 marketplace are designed to provide campus users with the most appropriate blend of pricing and efficient processes.

Users with UShop access are expected to use the UShop Marketplace in all instances where UShop is indicated as the preferred method.

This document will be updated as UShop is enhanced with additional functionality and/or contracted suppliers.

**UShop** Suppliers, functionality and commodities should be processed through the Ushop Marketplace.

![Checkmark]

Indicates preferred method for non-Ushop users, or for instances where UShop is not an available method.

![Information]

Indicates Method is acceptable, but is not the most efficient or the 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.

![Lock]

When users see this symbol, the method outlined is the ONLY method allowed.

![No Symbol]

Indicates method is prohibited by policy for the instances outlined.
<table>
<thead>
<tr>
<th>What is Being Purchased?</th>
<th>Important Notes and/or Requirements</th>
<th>How is it Best to Make This Purchase?</th>
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<td>Academic Dues</td>
<td>Refer to “Memberships/Academic Dues”</td>
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<tr>
<td>Advance Deposits...</td>
<td>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</td>
<td>UShop Preferred Method for UShop enabled departments—Submit a requisition in UShop University Travel Policy 3-030</td>
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<tr>
<td>Advertisements...</td>
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<td>Advertisements...</td>
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<td>Airline Tickets</td>
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<tr>
<td>Alcohol (Non-denatured ethyl)</td>
<td>Prefered Method for UShop enabled departments—Submit a requisition in UShop</td>
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<td>Alcoholic Beverages</td>
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<td>University Regulations Library 3-031</td>
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<td>Animals</td>
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Notes:
- UShop Preferred Method for UShop enabled departments—Submit a requisition in UShop
- Sole Method—Keep it on Campus and order through General Stores
- Preferred Method—Requisition
- Preferred Method for expenses totaling less than $5000—Purchasing Card
- Preferred Method for expenses totaling more than $5000—Requisition
- Preferred Method for purchases less than $5000—Limited Purchase Order; Purchasing Card (with business meal or alcohol authorization and compliance with department guidelines. Contact Office of General Counsel for restrictions for serving at events on campus.)
<table>
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<th>What is Being Purchased?</th>
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<th>How is it Best to Make This Purchase?</th>
<th>Policies and Resources</th>
</tr>
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<td>Awards-Monetary</td>
<td>Consult with Tax Services first, Employee Services Awards and should be coordinated through Human</td>
<td>Sole Method-Payroll Ad Comp</td>
<td>FBS Index &amp; Glossary – Employee Awards</td>
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<td>Awards for University Employee</td>
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<td>Preferred Method-Scholarship Administration System</td>
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<td>Awards-Monetary</td>
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<td>Restricted Method- Purchasing Card</td>
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<td>Awards for Matriculated University of Utah Students</td>
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<td>Preferred Method-Payment Request</td>
<td></td>
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<tr>
<td>Awards-Plaques, trophies, etc.</td>
<td></td>
<td>UShop</td>
<td></td>
</tr>
<tr>
<td>Books/Textbooks - Purchased on behalf of a student(s)</td>
<td>Textbooks purchased on behalf of matriculated University of Utah Students must be reported through the Scholarship Administration System.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
</tr>
<tr>
<td>Books/Textbooks - Purchased on behalf of a faculty member or for a specific course</td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card; Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td>Books/Textbooks - Purchased on behalf of a faculty member or for a specific course</td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td></td>
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<tr>
<td>Blood Donors</td>
<td>W-9 is required for for these payments.</td>
<td>Preferred Method–Limited Purchase Check</td>
<td>IRS Form W-9</td>
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<tr>
<td>Blood Donors</td>
<td></td>
<td>Acceptable Method-Payment Request</td>
<td></td>
</tr>
<tr>
<td>Campus Purchases</td>
<td>Campus Store, Chartwell’s, &amp; Guest House prefer the Purchasing Card.</td>
<td>Preferred Method-Purchasing Card or Campus Order</td>
<td>University Policy 3-193</td>
</tr>
<tr>
<td>Capital Equipment (costing more than $5,000)</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<td>UShop</td>
<td>Preferred Method – Requisition</td>
<td>University Policy 3-040</td>
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<td>Accepted Method – Campus Order (for on-campus purchases)</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<tr>
<th>Coffee Services</th>
<th>Important Notes and/or Requirements</th>
<th>How is it Best to Make This Purchase?</th>
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<tr>
<td>UShop</td>
<td>Preferred Method – Purchasing Card; Campus Order</td>
<td>Office of Software Licensing</td>
</tr>
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<td>Accepted Method – Limited Purchase Order; Requisition</td>
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</tbody>
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<table>
<thead>
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<th>Computer Hardware</th>
<th>Important Notes and/or Requirements</th>
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</thead>
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<tr>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Office of Software Licensing</td>
</tr>
<tr>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card or Keep it on Campus by using the Campus Bookstore.</td>
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<tr>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<tr>
<td>Accepted Method - Limited Purchase Order</td>
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</table>

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<thead>
<tr>
<th>Computer Software-including Programs and Licensing</th>
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<tr>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<tr>
<td>Preferred Method - Keep It On Campus by using the Campus Bookstore or the Office of Software Licensing</td>
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</tr>
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<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<tr>
<td>Conference, Seminar, Workshop- Registration Fees/Tuition--Off Campus/involving travel greater than 100 miles from campus.</td>
<td></td>
<td>![icon] Acceptable Method-Limited Purchase Order</td>
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<td></td>
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<td>![icon] Preferred Method- Travel Request</td>
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<td>![icon] Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
</tr>
<tr>
<td>Conference, Seminar, Workshop- Registration Fees/Tuition--Off Campus/local (less than 100 miles from campus)</td>
<td></td>
<td>![icon] Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
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<td></td>
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<td>![icon] Acceptable Method for expenses totaling less than $5000-Limited Purchase Order; Payment Request</td>
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<td></td>
<td>![icon] Acceptable Method for expenses totaling more than $5000-Requisition</td>
</tr>
<tr>
<td>Conference, Seminar, Workshop- Registration Fees/Tuition--On Campus-employee</td>
<td></td>
<td>![icon] Preferred Method-Pay staff tuition through Scholarship Administration System</td>
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<td>![icon] Preferred Method for expenses totaling less than $5000 (deposit included)-Purchasing Card</td>
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<td>![icon] Acceptable Method for expenses totaling less than $5000-Limited Purchase Order</td>
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<td></td>
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<td>![icon] Acceptable Method for on campus venues-Campus Order</td>
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<tr>
<td>Conference, Seminars, and Workshops-Hosting or Planning</td>
<td></td>
<td>![icon] Preferred Method-Keep It On Campus and contact University Conference &amp; Event Management.</td>
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<td></td>
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<td>![icon] Preferred Method for expenses totaling less than $5000 (deposit included)-Purchasing Card</td>
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<td></td>
<td></td>
<td>![icon] Acceptable Method for on campus venues-Campus Order</td>
</tr>
<tr>
<td>Consultants and Independent Contractors-Corporations or LLC</td>
<td>Must provide a completed Independent Contractor Agreement</td>
<td>![UShop] Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
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<td>![icon] Preferred Method for one-time payments totaling less than $5000-Payment Request</td>
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<td>![icon] Preferred Method for expenses totaling more than $5000 in one fiscal year-Requisition</td>
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<td>![icon] Restricted Method – Purchasing Card</td>
</tr>
<tr>
<td>Consultants and Independent Contractors-Individuals</td>
<td>Must provide a completed Independent Contractor Agreement and an Employee/Independent Contractor Classification Checklist if</td>
<td>![UShop] Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
</tr>
<tr>
<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<tr>
<td>the vendor is an individual.</td>
<td>Preferred Method for one-time payments totaling less than $5000 - Payment Request</td>
<td>University Policy 3-111</td>
</tr>
<tr>
<td></td>
<td>Preferred Method for expenses totaling more than $5000 in one fiscal year - Requisition</td>
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<td>Restricted Method – Purchasing Card</td>
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<tr>
<td>Construction</td>
<td>Refer to “Remodeling, Repair, or Alterations”</td>
<td></td>
</tr>
<tr>
<td>Controlled Substances (Drugs, chemicals, gas, etc.)</td>
<td>A DEA license may be required for these purchases.</td>
<td>UShop</td>
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<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
<td>Sole Method–Requisition</td>
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<td></td>
<td>Restricted Method–Campus Order; Payment Request; Limited Purchase Order; Purchasing Card</td>
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</tr>
<tr>
<td>Custodial Services</td>
<td>If the vendor is an individual, must provide a completed Independent Contractor Agreement and an Employee/Independent Contractor Classification Checklist.</td>
<td>UShop</td>
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<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method for On Campus Sites—Keep it on Campus by using Facilities Operations.</td>
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<td></td>
<td>Preferred Method for expenses totaling more than $5000 in a fiscal year or those requiring monthly payments–Requisition</td>
<td></td>
</tr>
<tr>
<td>Deposit Refunds</td>
<td>Preferred Method for refunds less than $100 – Petty Cash</td>
<td>Sole Method for refunds more than $100 – Payment Request</td>
</tr>
<tr>
<td>Employee Incentives or Gifts</td>
<td>Refer to “Gifts”, “Flowers”</td>
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</tr>
<tr>
<td>Equipment Purchases (Insurable $1,000 ~ $4,999)</td>
<td>UShop</td>
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<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method – Purchasing Card</td>
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<td>Acceptable Method for expenses totaling less than $5000–Limited Purchase Order</td>
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</tr>
<tr>
<td>Equipment Rental–One time rental/payment (operating lease -- not a capital lease agreement)</td>
<td>UShop</td>
<td>University Policy 3-110</td>
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<tr>
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<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method-Campus Order</td>
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<td>Acceptable Method for expenses totaling less than $5000-Limited Purchase Order</td>
</tr>
<tr>
<td>Equipment Rental--One-time rental/payment (capital lease agreement)</td>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
<td></td>
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<td>Sole Method – Requisition</td>
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<td>Restricted Method – Payment Request</td>
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<tr>
<td>Equipment Rental--Multiple payments for the same equipment (based on cumulative cost per year -- not a capital lease)</td>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
</tr>
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<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<tr>
<td>Fabricated Equipment</td>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition routed through Property Accounting</td>
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<td>Acceptable Method-Campus Order</td>
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<td>Fellowships</td>
<td>Refer to “Scholarships/Fellowships”</td>
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<td>Flowers--For Non-University Employees</td>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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</tr>
<tr>
<td>Flowers--For University employees (condolences only)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
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<tr>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card with special approval from Purchasing Card Program.</td>
<td></td>
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<td>Acceptable Method for expenses totaling less than $5000– Limited Purchase Order</td>
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<tr>
<td>Flowers--For special event décor or for landscaping</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td></td>
<td>Acceptable Method for expenses totaling less than $5000–Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td>Food and Meals (non-Travel)--Business Meals, Office Functions</td>
<td>Food and meals 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. 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.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
<td>Preferred Method –Keep it on Campus by using The Point.</td>
<td>University Policy 3-030</td>
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<tr>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card (with an approved business meal agreement)</td>
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<td></td>
<td>Preferred Method for expenses totaling more than $5000– Requisition</td>
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<tr>
<td></td>
<td>Acceptable Method – Limited Purchase Order</td>
<td>University Policy 3-031</td>
</tr>
<tr>
<td>Food and Meals (non-Travel)--Entertainment/Recruitment</td>
<td>Any purchase of food or meals for entertainment or recruiting purposes requires Dean or Director’s written approval. Alcohol may not be purchased with state appropriated funds.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
</tr>
<tr>
<td></td>
<td>Preferred Method –Keep it on Campus by using The Point or Chartwells</td>
<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
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<tr>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card (with an approved business meal agreement)</td>
<td>University Policy 3-031</td>
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<td>Preferred Method for expenses totaling more than $5000– Requisition</td>
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<td>Acceptable Method – Limited Purchase Order</td>
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<tr>
<td>Food and Meals (non-Travel)</td>
<td>Catering (Total cost including deposit)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
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<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
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<tr>
<td>Frequent Purchases</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100E</td>
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<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
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<td></td>
<td>Preferred Method for expenses totaling more than $5000– Requisition</td>
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<tr>
<td></td>
<td>Preferred Method-write “FR” on the invoice followed by the chartfield to which the expense should be charged and send the freight bills directly to Accounts Payable.</td>
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<tr>
<td></td>
<td>Acceptable Method totaling less than $5000-Limited Purchase Order</td>
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<td>Furniture</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Policy 3-205</td>
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<td></td>
<td>Preferred Method-Keep it on Campus by purchasing from University Surplus and Salvage.</td>
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<td>Preferred Method for furnishing projects totaling less than $5000-Purchasing Card</td>
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<td>Preferred Method for furnishing projects totaling more than $5000- Requisition</td>
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<td>Acceptable Method –Limited Purchase Order</td>
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<tr>
<td>Foreign Purchases</td>
<td>Customs or tariff charges may need to be paid.</td>
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<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
<td>Preferred Method – Requisition</td>
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<tr>
<td></td>
<td>acceptable Method for purchases less than $1000 and do not require customs clearance-Purchasing Card</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Restricted Method – Limited Purchase Order</td>
<td></td>
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<tr>
<td>Freight</td>
<td>If items were purchased on a purchase order then pay the freight on the PO.</td>
<td></td>
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<tr>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
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<td></td>
<td>Preferred Method for expenses totaling more than $5000– Requisition</td>
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<tr>
<td></td>
<td>Preferred Method-write “FR” on the invoice followed by the chartfield to which the expense should be charged and send the freight bills directly to Accounts Payable.</td>
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<tr>
<td></td>
<td>Acceptable Method totaling less than $5000-Limited Purchase Order</td>
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<tr>
<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<td><strong>G</strong></td>
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<tr>
<td>Gases</td>
<td>See &quot;Controlled Substances&quot;</td>
<td></td>
</tr>
<tr>
<td>Gifts/Gift Cards--For Non-University Employees (donors, University relations, etc)</td>
<td>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.</td>
<td><strong>UShop</strong> Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>✓</strong> Preferred Method – Keep it on Campus by purchasing from the Campus Bookstore or Positively U, Payment Request</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>✓</strong> Acceptable Method – Requisition</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>✗</strong> Acceptable Method with an approved Gift Exemption – Purchasing Card</td>
</tr>
<tr>
<td>Gifts/Gift Cards--For Employees</td>
<td>Gifts card purchases for employees, regardless of value, must be documented with their employee ID and reported to Tax Services and recorded as payroll compensation.</td>
<td><strong>UShop</strong> Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>✓</strong> Preferred Method – Keep it on Campus by purchasing from the Campus Bookstore or Positively U, Payment Request</td>
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<td></td>
<td></td>
<td><strong>✓</strong> Acceptable Method – Requisition</td>
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<tr>
<td></td>
<td></td>
<td><strong>✗</strong> Restricted Method – Purchasing Card</td>
</tr>
<tr>
<td>Guest Lecturers</td>
<td>Must complete a Guest Lecturer/Performer agreement.</td>
<td><strong>✓</strong> Preferred Method – Payment Request</td>
</tr>
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<td></td>
<td><strong>✗</strong> Restricted Method – Purchasing Card</td>
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<td><strong>H</strong></td>
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<tr>
<td>Honorariums</td>
<td></td>
<td><strong>✓</strong> Preferred Method – Payment Request</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>✗</strong> Restricted Method – Purchasing Card</td>
</tr>
<tr>
<td>Human Subjects and Research Participants</td>
<td>Payment requires IRS Form W-9. See guideline for additional requirements.</td>
<td><strong>✓</strong> Preferred Method – Limited Purchase Check</td>
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<td></td>
<td><strong>✓</strong> Acceptable Method – Payment Request</td>
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<td><strong>I</strong></td>
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<tr>
<td>Insurable Equipment</td>
<td>Refer to &quot;Equipment&quot;</td>
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<tr>
<td>Insurance (non-University employee)</td>
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<td><strong>UShop</strong> Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<tr>
<td>Lab Supplies</td>
<td>Refer to &quot;Supplies&quot;</td>
<td></td>
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<tr>
<td>Leases</td>
<td>Refer to &quot;Rentals/Leases&quot;</td>
<td></td>
</tr>
</tbody>
</table>
| **Legal Fees**          | Payment of legal fees need to be authorized by General Counsel. | UShop Preferred Method for UShop enabled departments-Submit a requisition in UShop  
|                         |                                     | University Policy 3-100              |
|                         |                                     | Preferable Method-Keep it on Campus by using General Counsel  
|                         |                                     | Preferable Method for expenses totaling less than $5000-Limited Purchase Order  
|                         |                                     | Preferable Method for expenses totaling more than $5000-Requisition |
| **License Renewal Fees**| Including Professional, Institutional, and Drug (DEA) Licensing | UShop Preferred Method for UShop enabled departments-Submit a requisition in UShop  
|                         |                                     | Preferable Method for expenses totaling less than $5000-Purchasing Card  
|                         |                                     | Acceptable Method for expenses totaling less than $5000-Limited Purchase Order  
|                         |                                     | Acceptable Method – Requisitions, Payment Request |
| **Lodging for Conferences** | Refer to "Travel"                   |                                      |
| **M**                   |                                     |                                      |
| 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 LPO/PR. Otherwise, prepare a requisition and ask for a blanket order. | UShop Preferred Method for UShop enabled departments-Submit a requisition in UShop  
|                         |                                     | Preferred Method –Keep it on Campus by working through Facilities Operations.  
|                         |                                     | Preferred Method for yearly expenses totaling less than $5000-Purchasing Card  
|                         |                                     | Preferred Method for yearly expenses totaling more than $5000 in a fiscal year Requisition  
<p>|                         |                                     | University Rule 3-100D                |
|                         |                                     | University Policy 3-205               |</p>
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<th>How is it Best to Make This Purchase?</th>
<th>Policies and Resources</th>
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<td>Medical Services</td>
<td>University Departments paying for medical services performed by other University Departments should pay for these via campus order or eJournal.</td>
<td><strong>UShop</strong></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
<td></td>
<td></td>
<td><strong>✓</strong></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td></td>
<td></td>
<td><strong>✓</strong></td>
<td>Preferred Method – Payment Request</td>
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<tr>
<td>Medications/Vaccinations</td>
<td>Refer to &quot;Controlled Substances&quot;</td>
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<td></td>
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<tr>
<td>Memberships and Academic Dues</td>
<td>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.</td>
<td><strong>UShop</strong></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
</tr>
<tr>
<td>Mileage Reimbursement-Non-University Employee</td>
<td></td>
<td><strong>✓</strong></td>
<td>Preferred Method – Travel Reimbursement; Payment Request</td>
</tr>
<tr>
<td>Mileage Reimbursements-University Employee</td>
<td></td>
<td><strong>✓</strong></td>
<td>Preferred Method for trips more than 100 away from campus-Travel Request</td>
</tr>
<tr>
<td>Moving Expenses-Moving Companies (Household or Office)</td>
<td></td>
<td></td>
<td><strong>✓</strong></td>
</tr>
<tr>
<td>Moving Expenses-Moving Companies (Household or Office)</td>
<td></td>
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<td><strong>✓</strong></td>
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<tr>
<td>Moving Expense Reimbursements</td>
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<td><strong>✓</strong></td>
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<td></td>
<td></td>
<td><strong>✓</strong></td>
<td>Preferred Method – Requisition</td>
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<td></td>
<td></td>
<td><strong>✓</strong></td>
<td>Acceptable Method for expenses totaling less than $5000 - Payment Request</td>
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<tr>
<td></td>
<td></td>
<td><strong>✓</strong></td>
<td>Restricted Method – Purchasing Card</td>
</tr>
<tr>
<td>Performers/Entertainers/DJ’s (Individuals and Groups)</td>
<td>Must use Guest Lecturer/Performer Agreement.C149</td>
<td><strong>UShop</strong></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
<td></td>
<td></td>
<td>FBS Index &amp; Glossary – Performer/Guest Lecturer Agreement</td>
</tr>
</tbody>
</table>

**Additional Notes:**
- University Rule 3-100E
- University Policy 3-032
- IRS Publication on Moving Expenses
- IRS Publication on Moving Expenses
- FBS Index & Glossary – Performer/Guest Lecturer Agreement
<table>
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<tr>
<th>What is Being Purchased?</th>
<th>Important Notes and/or Requirements</th>
<th>How is it Best to Make This Purchase?</th>
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</thead>
<tbody>
<tr>
<td>Printing and Copying Services</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method - Payment Request Preferred Method for multiple or recurring payments to the same group/individual-Requisition</td>
</tr>
<tr>
<td>UShop</td>
<td>Restricted Method – Purchasing Card</td>
<td></td>
</tr>
<tr>
<td>Preferred Method - Keep It On Campus by using University Print and Mail Services. Preferred Method for expenses totaling less than $5000-Purchasing Card Preferred Method for cumulative expenses totaling more than $5000 in a year-Requisition</td>
<td></td>
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<tr>
<td>Acceptable Method – Limited Purchase Order</td>
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</tr>
<tr>
<td>Printer/Copier purchases or Service Contracts</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method – Requisition</td>
</tr>
<tr>
<td>UShop</td>
<td>Preferred Method - Keep It On Campus by contacting the Copier Fleet department. Preferred Method for expenses totaling less than $5000-Purchasing Card Preferred Method for expenses totaling more than $5000-Requisition</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
<td>Copier Fleet Department</td>
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<tr>
<td>Acceptable Method – Limited Purchase Order</td>
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<tr>
<td>Purchases from an off-campus vendor</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method – Requisition</td>
</tr>
<tr>
<td>UShop</td>
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<tr>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card Preferred Method for expenses totaling more than $5000-Requisition</td>
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<tr>
<td>Acceptable Method – Limited Purchase Order</td>
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<tr>
<td>Purchases amounting to more than bid limits</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method – Requisition</td>
</tr>
<tr>
<td>UShop</td>
<td>Restricted Method – Purchasing Card; Limited Purchase Order; Payment Request</td>
<td>Restricted Method – Purchasing Card; Limited Purchase Order; Payment Request</td>
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<td></td>
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<tr>
<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<tr>
<td>Radioactive Isotopes</td>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td></td>
<td></td>
<td>Sole Method – Requisition</td>
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<td></td>
<td></td>
<td>Restricted Method – Campus Order; Payment Request; Limited Purchase Order; Purchasing Card</td>
</tr>
<tr>
<td>Registrations</td>
<td>Refer to “Conferences Seminars, Workshops, Tuition”</td>
<td>UShop</td>
</tr>
<tr>
<td>Reimbursements</td>
<td>Reimbursements &gt;$1000 must be approved by a Director or Chair and must include an explanation as to why preferred procurement methods were not used. Reimbursements for business meals for recruitment or entertainment purposes require a Dean or Director’s written approval. The University of Utah’s tax exempt status does not apply for these purchases and it is against Utah tax code to request tax exemption when paying with personal funds.</td>
<td>Preferred Method expenses incurred while &lt;100 miles away from campus–Payment Request</td>
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<td></td>
<td></td>
<td>Preferred Method for expenses incurred while &gt;100 miles away from campus–Travel Request</td>
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<tr>
<td></td>
<td></td>
<td>Preferred Method for &lt;$100 and incurred while &lt;100 miles away from campus– Petty Cash</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restricted Method – Purchasing Card; Limited Purchase Check</td>
</tr>
<tr>
<td>Rentals/Lease (real property, office space, storage)</td>
<td>Consult with Real Estate Administration first.</td>
<td>UShop</td>
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<td></td>
<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
<td></td>
<td></td>
<td>Sole Method – Requisition</td>
</tr>
<tr>
<td>Rentals (events, meeting space)</td>
<td>If the event is to be held at a hotel, contact the Purchasing Card Program to verify the controls on your card.</td>
<td>UShop</td>
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<td></td>
<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method-Keep It On Campus and contact the University Conference &amp; Event Management.</td>
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<td>Preferred Method for total expenses costing more than $5000 (including deposit)-Requisition</td>
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<td></td>
<td>Preferred Method for expenses totaling less than $5000 (including deposit)-Purchasing Card; Limited Purchase Order</td>
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<td></td>
<td></td>
<td>Preferred Method-Campus order for on-campus vendors.</td>
</tr>
<tr>
<td>Remodeling, Repair or Alterations of University physical facilities</td>
<td>Contact Campus Planning first.</td>
<td>Preferred Method- Keep it on Campus by working through Facilities Operations.</td>
</tr>
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<td></td>
<td></td>
<td>Preferred Method – Requisition.</td>
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<td>Restricted Method – Payment Request; Limited Purchase Order; Purchasing Card</td>
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<tr>
<td>Repairs and Maintenance</td>
<td>UShop</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<td>Preferred Method – Keep it on Campus by working through the Facilities Operations. Preferred Method for expenses totaling less than $5000 in a fiscal year - Purchasing Card Preferred Method for expenses totaling more than $5000 in a fiscal year - Requisition</td>
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<td></td>
<td>Acceptable Method for expenses totaling less than $5000 in a fiscal year - Limited Purchase Order</td>
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<td>Reprint fees (Manuscript and Page charges)</td>
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<td>UShop Preferred Method for UShop enabled departments - Submit a requisition in UShop Preferred Method for expenses totaling less than $5000 - Purchasing Card Preferred Method for expenses totaling more than $5000 - Requisition</td>
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<td></td>
<td>Acceptable Method for expenses totaling less than $5000 - Payment Request</td>
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<tr>
<td>Research Subject and Study Participant Payments</td>
<td>Requires IRS Form W-9</td>
<td>Preferred Method – Limited Purchase Check Preferred Method – Payment Request</td>
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<td></td>
<td></td>
<td>Restricted Method - Purchasing Card</td>
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<tr>
<td>Restricted items as outlined in Rule R3-100E</td>
<td>non-denatured ethyl alcohol requires a Tax-Free Alcohol and Usage Report form.</td>
<td>UShop Preferred Method for UShop enabled departments - Submit a requisition in UShop Preferred Method – Requisition Preferred Method – Campus Order</td>
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<td>Restricted Method – Payment Request</td>
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<td>Royalties</td>
<td>Requires IRS Form W-9</td>
<td>Preferred Method – Payment Request</td>
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<td>Scholarships and Fellowships</td>
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<td>Preferred Method – Scholarship/Fellowship Administration System</td>
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<td>Restricted Method – Payment Request, Limited Purchase Order, Purchasing Card, Traineeship Form, Payroll</td>
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<td>Services provided by University faculty, staff, and employees</td>
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<td>Restricted Method – Payment Request; Limited Purchase Order; Purchasing Card</td>
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<td>What is Being Purchased?</td>
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<tr>
<td>Services- plant maintenance, etc</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Facility Operations</td>
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<td>Preferred Method – Keep It On Campus by working through the Facilities Operations.</td>
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<td>Preferred Method for expenses totaling more than $5000 during a fiscal year-Requisition</td>
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<td>Acceptable Method for expenses totaling less than $5000 during a fiscal year – Limited Purchase Order</td>
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<td>Preferred Method-Keep it on Campus by using Print and Copy Services</td>
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<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td>Acceptable Method for expenses totaling less than $5000 – Limited Purchase Order</td>
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<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method – Keep it on Campus by using Office of Software Licensing</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td>Preferred Method for expenses totaling less than $5000-Purchasing Card; Limited Purchase Order</td>
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<td>Restricted Method – Payment Request</td>
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<td>Subcontracts (OSP)</td>
<td>Sole Method – Requisition</td>
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<td>Restricted Method – Payment Request; Purchasing Card</td>
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<tr>
<td>Subscriptions-- Magazines, Newspapers, and Periodicals</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
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<td>Subscriptions--Internet Access to Mission Critical Applications</td>
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<td>Acceptable Method – Limited Purchase order</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td>Acceptable Method for expenses totaling less than $5000– Limited Purchase Order</td>
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<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
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<td>Acceptable Method for expenses totaling less than $5000– Limited Purchase Order</td>
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<tr>
<td>Traineeships for Matriculated U of U Students</td>
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<td>Traineeships for matriculated students should be reported in the Scholarship Administration System and a copy of that reporting attached to the Traineeship Form.</td>
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<td>Preferred Method-Traineeship Form</td>
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<td>Restricted Method-Payment Request; Payroll</td>
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<td>Traineeships for Non-Matriculated U of U Students</td>
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<td>Preferred Method-Traineeship Form</td>
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<td>Acceptable Method-Payment Request</td>
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<td>Transcription Services</td>
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<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<td>Preferred Method for yearly expenses totaling less than $5000 – Purchasing Card</td>
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<td>Acceptable Method for yearly expenses totaling less than $5000-Limited Purchase Order</td>
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<tr>
<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it Best to Make This Purchase?</td>
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<tr>
<td>Travel Cash Advance</td>
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<td>Travel Cash Advance Form</td>
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<tr>
<td>Travel (lodging, hotels,</td>
<td>Utah state sales tax is required to</td>
<td>Preferred Method-Travel Request</td>
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<tr>
<td>motels, restaurants,</td>
<td>be paid upfront for Utah lodging sales</td>
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<tr>
<td>airline tickets, etc.)</td>
<td>tax. Tax Services Dept. files a</td>
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<td>quarterly Utah State Sales Refund</td>
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<td>Travel, Local Shuttle</td>
<td>Local Shuttle Service for non-</td>
<td>Preferred Method for non-employees -</td>
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<td>employees</td>
<td>Pcard</td>
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<td>Travel, Airfare</td>
<td>Airfare; Reimbursements for</td>
<td>Preferred Method – Submit to Travel</td>
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<td></td>
<td>University employees or guests</td>
<td>using Steps 1,2,3 Airfare Forms</td>
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<td>Preferred – Pay Request</td>
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<tr>
<td>Travel, Airfare</td>
<td>Airfare Early Reimbursements</td>
<td>FBS Index &amp; Glossary –Travel</td>
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<td></td>
<td>(employee, prior to trip)</td>
<td>Reimbursement</td>
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<td>Travel, Airfare</td>
<td>Airfare Early Reimbursements</td>
<td>FBS Index &amp; Glossary –Travel</td>
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<td>(non-employee, prior to trip)</td>
<td>Reimbursement</td>
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<td>Travel, Conf. Reg.</td>
<td>Conference Registration</td>
<td>Preferred Method – Submit to Travel</td>
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<td>Reimbursements (employee, prior to</td>
<td>using a Conference Payment Form;</td>
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<td>trip)</td>
<td>Purchasing Card</td>
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<td>Travel, Conf. Reg.</td>
<td>Conference Registration</td>
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<td>Reimbursements (non-employee,</td>
<td>using a Conference Payment Form,</td>
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<td>prior to trip)</td>
<td>Purchasing Card; Payment Request</td>
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<tr>
<td>Travel</td>
<td>Early Trip Reimbursements (employee</td>
<td>Preferred Method – Submit this to</td>
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<td>, prior to trip)</td>
<td>Travel using the Early Reimbursement Form.</td>
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<tr>
<td>Travel</td>
<td>Early Trip Reimbursements (non-</td>
<td>Preferred Method – Submit to Travel</td>
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<td>employee, prior to trip)</td>
<td>using an Early Reimbursement Form;</td>
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<td>Payment Request</td>
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</table>
| Travel, Hotel Prepayment | Hotel Deposit Reimbursements (employee, prior to trip)  
NOTE: All overnight-stay trips must be processed through the Travel Office. | ☑ Preferred Method – Submit to Travel using the Hotel Payment Form.  
Preferred Method – Payment Request | FBS Index & Glossary – Travel Reimbursement |
| Travel                   | Hotel Deposit Reimbursements (non-employee, prior to trip)  
NOTE: Guests of the University should provide original receipts, a detailed itinerary or accounting of expenditures. Travel form is required when airfare is booked with a travel form. | ☑ Preferred Method – Travel Request;  
Payment Request | FBS Index & Glossary – Hotel Prepayment |
| Travel                   | Mileage Reimbursements  
NOTE: A travel log is required (date, start and destination points, purpose) | ☑ Preferred Method for day trips <100 miles one-way and <$100-Petty Cash  
Preferred Method for day trips <100 miles one-way– Payment Request  
Preferred Method for day trips >100 miles one-way – Submit to Travel using a Final Reimbursement Form. | FBS Index & Glossary – Mileage (Personal) |
| Uniforms                 | UShop  
Preferred Method for UShop enabled departments-Submit a requisition in UShop  
Preferred Method for expenses totaling more than $5000-Requisition  
Preferred Method for expenses totaling less than $5000-Purchasing Card  
Acceptable Method for expenses totaling less than $5000–Limited Purchase Order | University Rule 3-100D |
| Utility Bills (monthly charges for Gas, Elec., etc.) | UShop  
Preferred Method for UShop enabled departments-Submit a requisition in UShop  
Preferred Method for expenses totaling less than $5000-Purchasing Card  
Preferred Method – Send directly to Accounts Payable. Send all approved-unpaid utility invoices to Accounts Payable for processing. Do not send invoices that have been paid with the Purchasing Card to Accounts Payable. | |
<table>
<thead>
<tr>
<th>What is Being Purchased?</th>
<th>Important Notes and/or Requirements</th>
<th>How is it Best to Make This Purchase?</th>
<th>Policies and Resources</th>
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</tbody>
</table>
| Vehicle Rentals         |                                     | Preferred Method-Keep in on campus by working through Facilities Operations’ Motor Pool | FBS Index & Glossary – Car Rental
University Regulations Library – 3-030 |
|                         |                                     | Preferred Method for trips >100 miles away– Travel Reimbursement | University Policy 3-030 |
|                         |                                     | Restricted Method – Purchasing Card |                        |
| **W**                   |                                     |                                       |                        |
|                         |                                     | Preferred Method for expenses totaling more than $5000-Requisition |                        |
|                         |                                     | Preferred Method for expenses totaling less than $5000 in one year-Purchasing Card |                        |
|                         |                                     | Acceptable Method for expenses totaling less than $5000 in one year-Limited Purchase Order |                        |
| Water Services          | Preferred Method for expenses totaling less that $5000-Purchasing Card |                        |                        |
| Workstations not requiring alterations to physical facilities | Preferred Method for expenses totaling more than $5000-Requisition |                        |                        |
|                         | Preferred Method for expenses totaling less than $5000-Purchasing Card; Limited Purchase Order |                        |                        |
| Workstations with panels requiring alterations to physical facilities | Refer to "Remodeling, Repair or Alterations of University Physical Facilities" |                        |                        |