Represents “Preferred Procurement Methods” as contemplated in Policy 3-010.III.A.2

NOTE: This guide will be updated several times throughout calendar year 2016 to reflect paper-based processes replaced by UShop processes.
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 have been 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.

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**UShop Marketplace**

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

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

- 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.

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

- This 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>
<th>Policies and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Dues</td>
<td>Refer to “Memberships/Academic Dues”</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Travel Policy 3-030</td>
</tr>
<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>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Procedure 3-100A</td>
</tr>
<tr>
<td>including conferences, restaurants, and catering</td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td>Advertisements-</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td>Programs and Billboards</td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td>Advertisement-</td>
<td>Purchasing department must provide approval for the use of the PCard to pay for employee recruitment expenses for faculty AND staff positions.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Policy 5-102</td>
</tr>
<tr>
<td>Employee Recruitment</td>
<td></td>
<td>Preferred Method – Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totalling less than $5000-Purchasing Card.</td>
<td></td>
</tr>
<tr>
<td>Airline Tickets</td>
<td>Refer to “Travel” section</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alcohol (Non-denatured ethyl)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
<td>University Rule 3-100E – See Section III B.2.d. of Policy (General Stores)</td>
</tr>
<tr>
<td>Alcohol Beverages</td>
<td>Sole Method–Keep it on Campus and order through General Stores</td>
<td></td>
<td>University Regulations Library 3-031</td>
</tr>
<tr>
<td>Animals</td>
<td>Requisitions for the purchase of animals for research or to put on display require the approval of the director of the Comparative Medicine Department.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100E</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>
<td>Policies and Resources</td>
</tr>
<tr>
<td>--------------------------</td>
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<td>--------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Awards-Monetary Awards for University Employee</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>
</tr>
<tr>
<td>Awards-Monetary Awards for Matriculated University of Utah Students</td>
<td></td>
<td>Preferred Method-Scholarship Administration System</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restricted Method- Purchasing Card</td>
<td></td>
</tr>
<tr>
<td>Awards- Monetary Awards for non-Matriculated University of Utah Students</td>
<td></td>
<td>Preferred Method-Payment Request</td>
<td></td>
</tr>
<tr>
<td>Awards-Plaques, trophies, etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td></td>
<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for purchases less than $5000-Purchasing Card; Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for purchases more than $5000–Requisition</td>
<td></td>
</tr>
</tbody>
</table>

**B**

| Blood Donors | | Preferred Method–Limited Purchase Check | IRS Form W-9 |
| Blood Donors | | Acceptable Method-Payment Request | |
| 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. | | |
| Books/Textbooks - Purchased on behalf of a faculty member or for a specific course | | | |
| | | Preferred Method for UShop enabled departments-Submit a requisition in UShop | |
| | | Preferred Method for expenses totaling less than $5000-Purchasing Card; Limited Purchase Order | |
| | | Preferred Method for expenses totaling more than $5000–Requisition | |

**C**

<p>| Campus Purchases | Campus Store, Chartwell’s, &amp; Guest House prefer the Purchasing Card. | Preferred Method-Purchasing Card or Campus Order | University Policy 3-193 |</p>
<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>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Equipment (costing more than $5,000)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method – Requisition</td>
<td>University Policy 3-040</td>
</tr>
<tr>
<td></td>
<td>▶️</td>
<td>Acceptable Method – Campus Order (for on-campus purchases)</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td></td>
<td>▶️</td>
<td></td>
<td>University Policy 3-045</td>
</tr>
<tr>
<td>Chemicals</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method – Keep it on Campus by using General Stores</td>
<td>University Rule 3-100E</td>
</tr>
<tr>
<td></td>
<td>▶️</td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card; Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▶️</td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td>Coffee Services</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method – Purchasing Card; Campus Order</td>
<td>Office of Software Licensing</td>
</tr>
<tr>
<td></td>
<td>▶️</td>
<td>Acceptable Method – Limited Purchase Order; Requisition</td>
<td></td>
</tr>
<tr>
<td>Computer Hardware</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card or Keep it on Campus by using the Campus Bookstore.</td>
<td></td>
</tr>
<tr>
<td>Purchases greater than $1,000 are insurable assets and should be recorded in the appropriate expense account.</td>
<td>▶️</td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
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<tr>
<td>Computer Software- including Programs and Licensing</td>
<td>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.</td>
<td>Preferred Method – Keep It On Campus by using the Campus Bookstore or the Office of Software Licensing</td>
<td></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>
<td>Policies and Resources</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Conference, Seminar, Workshop- Registration</td>
<td></td>
<td>Acceptable Method-Limited Purchase Order</td>
<td>University Policy 3-030</td>
</tr>
<tr>
<td>Fees/Tuition--Off Campus/involving travel greater than 100 miles from campus.</td>
<td></td>
<td>Preferred Method- Travel Request</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 –Purchasing Card</td>
<td></td>
</tr>
<tr>
<td>Conference, Seminar, Workshop- Registration</td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td></td>
</tr>
<tr>
<td>Fees/Tuition--On Campus/local (less than 100 miles from campus)</td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000-Limited Purchase Order; Payment Request</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td>Conference, Seminar, Workshop- Registration</td>
<td></td>
<td>Preferred Method-Pay staff tuition through Scholarship Administration System</td>
<td></td>
</tr>
<tr>
<td>Fees/Tuition--On Campus-employee</td>
<td></td>
<td>Restricted Method-Purchasing Card; Campus Order</td>
<td></td>
</tr>
<tr>
<td>Conference, Seminars, and Workshops-Hosting or Planning</td>
<td></td>
<td>Preferred Method-Keep It On Campus and contact University Conference &amp; Event Management. Introduction through Scholarship Administration System</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 (deposit included)-Purchasing Card</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000-Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for on campus venues-Campus Order</td>
<td></td>
</tr>
<tr>
<td>Consultants and Independent Contractors -Corporations or LLC</td>
<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td>Consultants and Independent Contractors -Individuals</td>
<td></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></td>
<td>Preferred Method for expenses totaling more than $5000 in one fiscal year-Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restricted Method – Purchasing Card</td>
<td></td>
</tr>
<tr>
<td>Consultants and Independent Contractors -Independent Contractor Agreement</td>
<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100D</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>
<td>Policies and Resources</td>
</tr>
<tr>
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<td>the vendor is an individual.</td>
<td>Preferred Method for one-time payments totaling less than $5000 - Payment Request</td>
<td>Preferred Method for expenses totaling more than $5000 in one fiscal year - Requisition</td>
<td>University Policy 3-111</td>
</tr>
<tr>
<td>Construction</td>
<td>Refer to “Remodeling, Repair, or Alterations”</td>
<td>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>University Rule 3-100E</td>
</tr>
<tr>
<td>Controlled Substances (Drugs, chemicals, gas, etc.)</td>
<td>A DEA license may be required for these purchases.</td>
<td>Sole Method – Requisition</td>
<td>University Policy 3-111</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restricted Method – Campus Order; Payment Request; Limited Purchase Order; Purchasing Card</td>
<td></td>
</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>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>University Policy 3-111</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for On Campus Sites – Keep it on Campus by using Facilities Operations.</td>
<td></td>
</tr>
<tr>
<td></td>
<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>D</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deposit Refunds</td>
<td></td>
<td>Preferred Method for refunds less than $100 – Petty Cash</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sole Method for refunds more than $100 – Payment Request</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Incentives or Gifts</td>
<td>Refer to “Gifts”, “Flowers”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment Purchases (Insurable $1,000 ~ $4,999)</td>
<td>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>Preferred Method – Purchasing Card</td>
<td>University Policy 3-041</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000 – Limited Purchase Order</td>
<td>University Policy 3-040</td>
</tr>
<tr>
<td>Equipment Rental – One time rental/payment (operating lease – not a capital lease agreement)</td>
<td>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>University Policy 3-040</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>
<td>Policies and Resources</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method-Campus Order</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000-Limited Purchase Order</td>
<td>University Expenditure Guidelines</td>
</tr>
<tr>
<td>Equipment Rental--One-time rental/payment (capital lease agreement)</td>
<td>UShop MARKETPLACE</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sole Method – Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restricted Method – Payment Request</td>
<td></td>
</tr>
<tr>
<td>Equipment Rental--Multiple payments for the same equipment (based on cumulative cost per year -- not a capital lease)</td>
<td>UShop MARKETPLACE</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td>University Policy 3-041</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td>University Policy 3-040</td>
</tr>
<tr>
<td>Fabricated Equipment</td>
<td></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000- Requisition routed through Property Accounting</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method-Campus Order</td>
<td></td>
</tr>
<tr>
<td>Fellowships</td>
<td>Refer to “Scholarships/Fellowships”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flowers--For Non-University Employees</td>
<td>UShop MARKETPLACE</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Expenditure Guidelines</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000– Limited Purchase Order</td>
<td></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>
<td>Policies and Resources</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------</td>
<td>--------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Flowers--For University employees (condolences only)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card with special approval from Purchasing Card Program.</td>
<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
</tr>
<tr>
<td>Flowers--For special event décor or for landscaping</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</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 –Keep it on Campus by using The Point. Preferred Method for expenses totaling less than $5000 – Purchasing Card (with an approved business meal agreement) Preferred Method for expenses totaling more than $5000– Requisition</td>
<td>University Policy 3-030</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 –Keep it on Campus by using The Point or Chartwells Preferred Method for expenses totaling less than $5000 – Purchasing Card (with an approved business meal agreement) Preferred Method for expenses totaling more than $5000– Requisition</td>
<td>University Policy 3-031</td>
</tr>
<tr>
<td>Food and Meals (non-Travel) Catering (Total cost including deposit)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card with special approval from Purchasing Card Program.</td>
<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
</tr>
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<td>What is Being Purchased?</td>
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<tr>
<td><strong>Preferred Method</strong></td>
<td>- Keep it on Campus by using The Point or Chartwells.</td>
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</tr>
<tr>
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<td>- Preferred Method for expenses totaling less than $5000 – Purchasing Card (with an approved business meal agreement)</td>
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</tr>
<tr>
<td></td>
<td>- Preferred Method for expenses totaling more than $5000 – Requisition</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Acceptable Method</strong></td>
<td>- Campus Order; Limited Purchase Order</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Foreign Purchases</strong></td>
<td>Customs or tariff charges may need to be paid.</td>
<td>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>University Rule 3-100E</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<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></td>
<td>Restricted Method – Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td><strong>Freight</strong></td>
<td>If items were purchased on a purchase order then pay the freight on the PO.</td>
<td>Preferred Method for UShop enabled departments – Submit a requisition in UShop</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000 – Requisition</td>
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<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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<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000 – Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td><strong>Furniture</strong></td>
<td>Facilities review and approval is required for purchases totalling more than $5000.</td>
<td>Preferred Method for UShop enabled departments – Submit a requisition in UShop</td>
<td>University Policy 3-205</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Keep it on Campus by purchasing from University Surplus and Salvage.</td>
<td></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></td>
<td></td>
<td>Acceptable Method – Limited Purchase Order</td>
<td></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>
<td>Policies and Resources</td>
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<td><strong>G</strong></td>
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<tr>
<td>Gases</td>
<td>See “Controlled Substances”</td>
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<tr>
<td><strong>Gifts/Gift Cards</strong></td>
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<tr>
<td><strong>For Non-University Employees (donors, University relations, etc)</strong></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>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>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Keep it on Campus by purchasing from the Campus Bookstore or Positively U, Payment Request</td>
<td>Payments to Human Research Participants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method – Requisition Acceptable Method with an approved Gift Exemption – Purchasing Card</td>
<td></td>
</tr>
<tr>
<td><strong>Gifts/Gift Cards</strong></td>
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<tr>
<td><strong>For Employees</strong></td>
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<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>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>Tax Services Discussion on Employee Awards</td>
</tr>
<tr>
<td></td>
<td>Preferred Method – Keep it on Campus by purchasing from the Campus Bookstore or Positively U, Payment Request</td>
<td>Preferred Method – Requisition</td>
<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
</tr>
<tr>
<td>Guest Lecturers</td>
<td>Must complete a Guest Lecturer/Performer agreement.</td>
<td>Preferred Method – Payment Request</td>
<td>FBS Index &amp; Glossary – Guest Lecturer/Performer Agreement</td>
</tr>
<tr>
<td></td>
<td>Preferred Method – Payment Request</td>
<td>Restricted Method – Purchasing Card</td>
<td></td>
</tr>
<tr>
<td><strong>H</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Honorariums</td>
<td>Preferred Method – Payment Request</td>
<td>University Policy 3-062</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred Method – Payment Request</td>
<td>Restricted Method – Purchasing Card</td>
<td></td>
</tr>
<tr>
<td>Human Subjects and Research Participants</td>
<td>Payment requires IRS Form W-9. See guideline for additional requirements.</td>
<td>Preferred Method – Limited Purchase Check</td>
<td>Payments to Human Research Participants</td>
</tr>
<tr>
<td></td>
<td>Preferred Method – Limited Purchase Check</td>
<td>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 “Equipment”</td>
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</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>
<td>Policies and Resources</td>
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<td></td>
<td>Preferred Method for expenses totaling less than $5000-Limited Purchase Order</td>
<td>University Policy 3-100</td>
</tr>
<tr>
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<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td>University Policy 3-205</td>
</tr>
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<td>L</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>
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<tr>
<td>Legal Fees</td>
<td>Payment of legal fees need to be authorized by General Counsel.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Policy 3-100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferable Method-Keep it on Campus by using General Counsel</td>
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<td>Preferable Method for expenses totaling less than $5000-Limited Purchase Order</td>
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<td></td>
<td>Preferable Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td>License Renewal Fees</td>
<td>Including Professional, Institutional, and Drug (DEA) Licensing</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Policy 3-100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferable Method for expenses totaling less than $5000-Purchasing Card</td>
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<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000-Limited Purchase Order</td>
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<tr>
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<td></td>
<td>Acceptable Method – Requisitions, Payment Request</td>
<td></td>
</tr>
<tr>
<td>Lodging for Conferences</td>
<td>Refer to &quot;Travel&quot;</td>
<td></td>
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<tr>
<td>Maintenance-Equipment- Includes Maintenance Agreements and One-Time Repairs</td>
<td>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.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Policy 3-100D</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method –Keep it on Campus by working through Facilities Operations.</td>
<td></td>
</tr>
<tr>
<td></td>
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<td>Preferred Method for yearly expenses totaling less than $5000 in a fiscal year-Purchasing Card</td>
<td></td>
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<td></td>
<td></td>
<td>Preferred Method for yearly expenses totaling more than $5000 in a fiscal year-Requisition</td>
<td></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>
<td>Policies and Resources</td>
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</tr>
<tr>
<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>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>UShop MarketPlace</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td>University Rule 3-100E</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Payment Request</td>
<td>University Policy 3-032</td>
</tr>
<tr>
<td>Medications/Vaccinations</td>
<td>Refer to &quot;Controlled Substances&quot;</td>
<td>[ ] Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>[ ] University Policy – 3-032</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for dues totaling more than $5000-Requisition</td>
<td>IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for dues renewals less than $5000-Purchasing Card</td>
<td>IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method for new/first-time dues-Payment Request</td>
<td>IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td>Mileage Reimbursement-</td>
<td>Preferred Method -Travel Reimbursement; Payment Request</td>
<td>[ ] Preferred Method for trips more than 100 miles away from campus-Travel Request</td>
<td>[ ] IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td>Non-University Employee</td>
<td></td>
<td>[ ] Preferred Method for trips less than 100 miles one way from campus-Petty Cash</td>
<td>[ ] IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td>Mileage Reimbursements-</td>
<td></td>
<td>Acceptable Method for trips less than 100 miles one-way from campus-Payment Request</td>
<td>[ ] IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td>University Employee</td>
<td></td>
<td>[ ] Acceptable Method for trips less than 100 miles one-way from campus-Payment Request</td>
<td>[ ] IRS Publication on Moving Expenses</td>
</tr>
<tr>
<td>Moving Expenses-</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>[ ] Preferred Method – Requisition</td>
<td>[ ] FBS Index &amp; Glossary – Performer/Guest Lecturer Agreement</td>
</tr>
<tr>
<td>Moving Companies</td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000 - Payment Request</td>
<td>[ ] FBS Index &amp; Glossary – Performer/Guest Lecturer Agreement</td>
</tr>
<tr>
<td>(Household or Office)</td>
<td></td>
<td>Restricted Method – Purchasing Card</td>
<td>[ ] FBS Index &amp; Glossary – Performer/Guest Lecturer Agreement</td>
</tr>
<tr>
<td>Moving Expense Reimbursements</td>
<td>Preferable Method for University Employees (uID assigned)- Travel Request</td>
<td>[ ] Preferable Method for non-employees – Payment Request</td>
<td>[ ] FBS Index &amp; Glossary – Performer/Guest Lecturer Agreement</td>
</tr>
</tbody>
</table>

Performers/Entertainers /DJ's (Individuals and Groups) Must use Guest Lecturer/Performer Agreement.C149 Preferred Method for UShop enabled departments-Submit a requisition in UShop FBS Index & Glossary – Performer/Guest Lecturer Agreement
<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>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Payment Request</td>
<td>Print and Mail Services</td>
</tr>
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<td></td>
<td></td>
<td>Preferred Method for multiple or recurring payments to the same group/individual – Requisition</td>
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<td>Restricted Method – Purchasing Card</td>
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</tr>
<tr>
<td>Printing and Copying Services</td>
<td>Preferred Method for UShop enabled departments - Submit a requisition in UShop</td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred Method – Keep It On Campus by using University Print and Mail Services.</td>
<td>Preferred Method for cumulative expenses totaling more than $5000 in a year – Requisition</td>
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<td></td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
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<td></td>
<td>Acceptable Method – Limited Purchase Order</td>
<td></td>
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<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 for expenses totaling less than $5000 – Purchasing Card</td>
<td>Copier Fleet Department</td>
</tr>
<tr>
<td></td>
<td>Preferred Method – Keep It On Campus by contacting the Copier Fleet department.</td>
<td>Preferred Method for expenses totaling more than $5000 – Requisition</td>
<td></td>
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<td></td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
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<td></td>
<td>Acceptable Method – Limited Purchase Order</td>
<td></td>
<td></td>
</tr>
<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 for expenses totaling less than $5000 – Purchasing Card</td>
<td>University Regulations Library – R3-100C</td>
</tr>
<tr>
<td></td>
<td>Preferred Method for expenses totaling more than $5000 – Requisition</td>
<td></td>
<td></td>
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<td></td>
<td>Acceptable Method – Limited Purchase Order</td>
<td></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>
<td></td>
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<td></td>
<td>Preferred Method – Requisition</td>
<td></td>
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<tr>
<td></td>
<td>Restricted Method – Purchasing Card; Limited Purchase Order; Payment Request</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>
<td>Policies and Resources</td>
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<tr>
<td><strong>Radioactive Isotopes</strong></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
<td>University Rule 3-100E</td>
</tr>
<tr>
<td></td>
<td>Sole Method – Requisition</td>
<td></td>
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<tr>
<td></td>
<td>Restricted Method – Campus Order; Payment Request; Limited Purchase Order; Purchasing Card</td>
<td></td>
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<tr>
<td><strong>Registrations</strong></td>
<td>Refer to “Conferences Seminars, Workshops, Tuition”</td>
<td></td>
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<tr>
<td><strong>Reimbursements</strong></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>
<td>University Policy 3-010</td>
</tr>
<tr>
<td></td>
<td>Preferred Method for expenses incurred while &gt;100 miles away from campus–Travel Request</td>
<td>Preferred Method for &lt;$100 and incurred while &lt;100 miles away from campus–Petty Cash</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Restricted Method – Purchasing Card; Limited Purchase Check</td>
<td></td>
<td>University Rule 3-010A</td>
</tr>
<tr>
<td><strong>Rentals/Lease (real property, office space, storage)</strong></td>
<td>Consult with Real Estate Administration first.</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Policy 3-110</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sole Method – Requisition.</td>
<td></td>
</tr>
<tr>
<td><strong>Rentals (events, meeting space)</strong></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>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
</tr>
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<td></td>
<td></td>
<td>Preferred Method-Keep It On Campus and contact the University Conference &amp; Event Management.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Preferred Method for total expenses costing more than $5000 (including deposit)-Requisition</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 (including deposit)-Purchasing Card; Limited Purchase Order</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Preferred Method-Campus order for on-campus vendors.</td>
<td></td>
</tr>
<tr>
<td><strong>Remodeling, Repair or Alterations of University physical facilities</strong></td>
<td>Contact Campus Planning first.</td>
<td>Preferred Method- Keep it on Campus by working through Facilities Operations.</td>
<td>University Policy 3-205</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Requisition.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restricted Method – Payment Request; Limited Purchase Order; Purchasing Card</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td><strong>Repairs and Maintenance</strong></td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td></td>
<td>University Policy 3-205</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>
<td>Policies and Resources</td>
</tr>
<tr>
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</tr>
<tr>
<td>Reprint fees (Manuscript and Page charges)</td>
<td></td>
<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>
<td>University Rule 3-100D</td>
</tr>
<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>
<td>Guidelines for Payments to Human Research Participants</td>
</tr>
<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>Preferred Method for UShop enabled departments-Submit a requisition in UShop Preferred Method – Requisition Preferred Method – Campus Order</td>
<td>University Rule 3-100E</td>
</tr>
<tr>
<td>Royalties</td>
<td>Requires IRS Form W-9</td>
<td>Preferred Method – Payment Request</td>
<td>IRS Form W-9</td>
</tr>
<tr>
<td>Scholarships and Fellowships</td>
<td></td>
<td>Preferred Method – Scholarship/Fellowship Administration System</td>
<td>University Policy 5-403</td>
</tr>
<tr>
<td>Services provided by University faculty, staff, and employees</td>
<td></td>
<td>Preferred Method – Process through Payroll</td>
<td></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>
<td>Policies and Resources</td>
</tr>
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<td>--------------------------------------------------------------</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>Preferred Method – Keep It On Campus by working through the Facilities Operations.</td>
<td>Facility Operations</td>
</tr>
<tr>
<td></td>
<td>Preferred Method for expenses totaling more than $5000 during a fiscal year- Requisition</td>
<td>Acceptable Method for expenses totaling less than $5000 during a fiscal year – Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td>Signage</td>
<td>Preferred Method for UShop enabled departments- Submit a requisition in UShop</td>
<td>Preferred Method-Keep it on Campus by using Print and Copy Services</td>
<td>University Rule 3-100D</td>
</tr>
<tr>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acceptable Method for expenses totaling less than $5000 – Limited Purchase Order</td>
<td></td>
</tr>
<tr>
<td>Software</td>
<td>All subscriptions and cloud-based software not available from OSL should be paid for using PCard.</td>
<td>Preferred Method for expenses totaling more than $5000 - UShop Requisition</td>
<td>Office of Software Licensing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred Method – Keep it on Campus by using Office of Software Licensing</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling more than $5000 - Paper Requisition (Through August ’16)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000, and not available from OSL - Purchasing Card</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Restricted Method – Payment Request</td>
<td></td>
</tr>
<tr>
<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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<tr>
<td>What is Being Purchased?</td>
<td>Important Notes and/or Requirements</td>
<td>How is it best to make this purchase?</td>
<td>Policies and Resources</td>
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<td>Subscriptions—Internet Access to Mission Critical Applications</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100D</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>Acceptable Method for expenses totaling less than $5000—Limited Purchase Order</td>
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<tr>
<td>Supplies (Lab or Office)</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Preferred Method for expenses totaling less than $5000—Limited Purchase Order</td>
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<tr>
<td>Temporary Employment Services/Agencies</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>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>
<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>Traineeship Forms and Instructions</td>
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<td></td>
<td>Preferred Method—Traineeship Form</td>
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<td>Restricted Method—Payment Request; Payroll</td>
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<tr>
<td>Traineeships for Non-Matriculated U of U Students</td>
<td>Preferred Method—Traineeship Form</td>
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<td>Traineeship Forms and Instructions</td>
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<td></td>
<td>Acceptable Method—Payment Request</td>
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<td>Transcription Services</td>
<td>Preferred Method for expenses totaling more than $5000 - Requisition Preferred Method for yearly expenses totaling less than $5000 – Purchasing Card</td>
<td>University Rule 3-100D</td>
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<td></td>
<td>Acceptable Method for yearly expenses totaling less than $5000 - Limited Purchase Order</td>
<td>FBS Index &amp; Glossary – Travel Reimbursement</td>
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<tr>
<td>Travel Cash Advance</td>
<td>Travel Cash Advance Form</td>
<td>Preferred Method - Travel Request</td>
<td>University Policy 3-030</td>
</tr>
<tr>
<td>Travel (lodging, hotels, motels, restaurants, airline tickets, etc.)</td>
<td>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.</td>
<td>Restricted Method – Purchasing Card; NOTE: University Guest House is allowed on the PCard</td>
<td>FBS Index &amp; Glossary – Airfare Request Form</td>
</tr>
<tr>
<td>Travel, Local Shuttle</td>
<td>Preferred Method for non-employees - PCard</td>
<td>FBS Index &amp; Glossary – Travel Reimbursement</td>
<td></td>
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<tr>
<td>Travel, Airfare</td>
<td>Preferred Method – Submit to Travel using Steps 1,2,3 Airfare Forms Acceptable Method for non-employees – Payment Request</td>
<td>University Policy 3-030</td>
<td></td>
</tr>
<tr>
<td>Travel, Airfare</td>
<td>Acceptable Method – Submit to Travel using an Early Reimbursement Form</td>
<td>FBS Index &amp; Glossary – Travel Reimbursement</td>
<td></td>
</tr>
<tr>
<td>Travel, Airfare</td>
<td>Acceptable – Submit to Travel using an Early Reimbursement Form</td>
<td>University Policy 3-030</td>
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<tr>
<td>Travel, Conf. Reg.</td>
<td>Preferred Method – Submit to Travel using a Conference Payment Form; Purchasing Card</td>
<td>FBS Index &amp; Glossary – Travel Reimbursement</td>
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<tr>
<td>Travel, Conf. Reg.</td>
<td>Preferred Method – Submit to Travel using a Conference Payment Form, Purchasing Card; Payment Request</td>
<td>University Policy 3-030</td>
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<tr>
<td>Travel</td>
<td>Preferred Method – Submit this to Travel using the Early Reimbursement Form.</td>
<td>University Policy 3-030</td>
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<tr>
<td>What is Being Purchased?</td>
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<tr>
<td>Travel</td>
<td>Early Trip Reimbursements (non-employee, prior to trip) &lt;br&gt;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.</td>
<td>Preferred Method – Submit to Travel using an Early Reimbursement Form; Payment Request</td>
<td>University Policy 3-030</td>
</tr>
<tr>
<td>Travel, Hotel Prepayment</td>
<td>Hotel Deposit Reimbursements (employee, prior to trip) &lt;br&gt;NOTE: All overnight-stay trips must be processed through the Travel Office.</td>
<td>Preferred Method – Submit to Travel using the Hotel Payment Form.</td>
<td>FBS Index &amp; Glossary – Hotel Prepayment</td>
</tr>
<tr>
<td>Travel</td>
<td>Hotel Deposit Reimbursements (non-employee, prior to trip) &lt;br&gt;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.</td>
<td>Preferred Method – Travel Request; Payment Request</td>
<td>FBS Index &amp; Glossary – Hotel Prepayment</td>
</tr>
<tr>
<td>Travel</td>
<td>Mileage Reimbursements &lt;br&gt;NOTE: A travel log is required (date, start and destination points, purpose)</td>
<td>Preferred Method for day trips &lt;100 miles one-way and &lt;$100-Petty Cash &lt;br&gt;Preferred Method for day trips &lt;100 miles one-way– Payment Request &lt;br&gt;Preferred Method for day trips &gt;100 miles one-way – Submit to Travel using a Final Reimbursement Form.</td>
<td>FBS Index &amp; Glossary – Mileage (Personal)</td>
</tr>
<tr>
<td>Uniforms</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>University Rule 3-100D</td>
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<tr>
<td>Utility Bills (monthly charges for Gas, Elec., etc.)</td>
<td>Preferred Method for expenses totaling more than $5000-Requisition &lt;br&gt;Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
<td>FBS Index &amp; Glossary – Travel Reimbursement</td>
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<td>What is Being Purchased?</td>
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<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card</td>
<td>FBS Index &amp; Glossary – Car Rental University Regulations Library – 3-030</td>
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<td>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.</td>
<td>University Policy 3-030</td>
</tr>
<tr>
<td>V</td>
<td>Vehicle Rentals</td>
<td>Preferred Method-Keep in on campus by working through Facilities Operations’ Motor Pool</td>
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<td>Preferred Method for trips &gt;100 miles away – Travel Reimbursement</td>
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<td>Restricted Method – Purchasing Card</td>
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<td>W</td>
<td>Waste Disposal</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 in one year-Purchasing Card</td>
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<td>Acceptable Method for expenses totaling less than $5000 in one year-Limited Purchase Order</td>
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<td>Water Services</td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card</td>
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<tr>
<td>Workstations not requiring alterations to physical facilities</td>
<td>Preferred Method for expenses totaling more than $5000-Requisition</td>
<td>Preferred Method for expenses totaling less than $5000-Purchasing Card; Limited Purchase Order</td>
<td></td>
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<tr>
<td>Workstations with panels requiring alterations to physical facilities</td>
<td>Refer to &quot;Remodeling, Repair or Alterations of University Physical Facilities&quot;</td>
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