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.

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

- 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.

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

- Indicates method is prohibited by policy for the instances outlined.
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<td>Chemicals</td>
<td>Non-denatured ethyl alcohol is restricted and should be ordered thorough General Stores only. See also: Alcohol,</td>
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<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 for USShop enabled departments—Submit a requisition in USShop</td>
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<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>
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<td>Acceptable Method – Limited Purchase Order</td>
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<td>University Policy 3-031</td>
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<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>
<td>See ‘Rules regarding Meals, Awards &amp; Gifts’ and University Expenditure Guidelines</td>
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<tr>
<td></td>
<td>Preferred Method –Keep it on Campus by using The Point or Chartwells</td>
<td>Preferred Method for expenses totaling less than $5000 – Purchasing Card (with an approved business meal agreement)</td>
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<td>Customs or tariff charges may need to be paid.</td>
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<td>acceptable Method for purchases less than $1000 and do not require customs clearance-Purchasing Card</td>
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<td>Freight</td>
<td>If items were purchased on a purchase order then pay the freight on the PO.</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>Acceptable Method for expenses totaling less than $5000-Limited Purchase Order</td>
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<td>Furniture</td>
<td>Facilities review and approval is required for purchases totalling more than $5000.</td>
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<td>Preferred Method-Keep it on Campus by purchasing from University Surplus and Salvage.</td>
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### Gases

See "Controlled Substances"

### Gifts/Gift Cards–For Non-University Employees (donors, University relations, etc)

All gift purchases must be documented with the name of the individual(s) receiving the gift and their relationship to the University (if a non-employee). Also see Human Subjects section.

- **Preferred Method** for UShop enabled departments-Submit a requisition in UShop
- Preferred Method – Keep it on Campus by purchasing from University Surplus and Salvage.
- Preferred Method with an approved Gift Exemption – Purchasing Card
- Acceptable Method – Requisition

See ‘Rules regarding Meals, Awards & Gifts’ and University Expenditure Guidelines

### Payments to Human Research Participants

### Gifts/Gift Cards–For Employees

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.

- **Preferred Method** for UShop enabled departments-Submit a requisition in UShop
- Preferred Method – Keep it on Campus by purchasing from the Campus Bookstore or Positively U, Payment Request
- Acceptable Method – Requisition

See ‘Rules regarding Meals, Awards & Gifts’ and University Expenditure Guidelines

### Tax Services Discussion on Employee Awards


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<td>Must complete a Guest Lecturer/Performer agreement.</td>
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<td>Human Subjects and Research Participants</td>
<td>Payment requires IRS Form W-9. See guideline for additional requirements.</td>
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<td>Payment of legal fees need to be authorized by General Counsel.</td>
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<td>Including Professional, Institutional, and Drug (DEA) Licensing</td>
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<td>Refer to &quot;Travel&quot;</td>
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<td>Maintenance-Equipment*</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.</td>
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*Maintenance-Equipment includes maintenance agreements and one-time repairs.
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<td>Only one payment is allowed per LPO/PR. Otherwise, prepare a requisition and ask for a blanket order.</td>
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<td>University Departments paying for medical services performed by other University Departments should pay for these via campus order or ejournal.</td>
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<td>Membership 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>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<td>Performers/Entertainers/DJ's (Individuals and Groups)</td>
<td>Must use Guest Lecturer/Performer Agreement.C149</td>
<td>Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
<td>FBS Index &amp; Glossary – Performer/Guest Lecturer Agreement</td>
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**P Policies and Resources**

- University Policy 3-205
- University Rule 3-100E
- IRS Publication on Moving Expenses
- University Policy 3-032
- FBS Index & Glossary – Performer/Guest Lecturer Agreement
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<tr>
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<td><strong>UShop</strong> Preferred Method for UShop enabled departments-Submit a requisition in UShop</td>
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<tr>
<td>Reimbursements (&gt; $1000)</td>
<td>纂 reimbursments &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 Preferred Method for expenses incurred while &gt;100 miles away from campus-Travel Request Preferred Method for &lt;$100 and incurred while &lt;100 miles away from campus- Petty Cash</td>
<td>University Policy 3-010</td>
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<td>Rentals/Lease (real property, office space, storage)</td>
<td>Consult with Real Estate Administration first.</td>
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<td>Preferred Method-Keep It On Campus and contact the University Conference &amp; Event Management. Preferred Method for total expenses costing more than $5000 (including deposit)-Requisition Preferred Method for expenses totaling less than $5000 (including deposit)-Purchasing Card; Limited Purchase Order Preferred Method-Campus order for on-campus vendors.</td>
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<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. Preferred Method – Requisition.</td>
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<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</td>
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<td>All subscriptions and cloud-based software not available from OSL should be paid for using PCard.</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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<tr>
<td>Transcription Services</td>
<td>Acceptable Method - Payment Request</td>
<td>University 3-100D</td>
<td>Preferred Method for expenses totaling more than $5000 - Requisition</td>
</tr>
<tr>
<td></td>
<td>Prefered Method for yearly expenses totaling less than $5000 - Purchasing Card</td>
<td></td>
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</tr>
<tr>
<td>Travel Cash Advance</td>
<td>Travel Cash Advance Form</td>
<td>FBS Index &amp; Glossary</td>
<td>Travel Request</td>
</tr>
<tr>
<td>Travel (lodging, hotels, motels, restaurants, airline tickets, etc.)</td>
<td>Acceptable Method for yearly expenses totaling less than $5000 - Limited Purchase Order</td>
<td></td>
<td>Restricted Method - Requisition Card; NOTE: University Guest House is allowed on the PCard.</td>
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<tr>
<td>Travel, Local Shuttle Service for non-employees</td>
<td>Preferred Method for non-employees - Pcard</td>
<td></td>
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<tr>
<td>Travel, Airfare</td>
<td>Acceptable Method - Payment Request</td>
<td>University Policy 3-030</td>
<td>Preferred Method – Submit to Travel using Steps 1,2,3 Airfare Forms</td>
</tr>
<tr>
<td>Travel, Airfare</td>
<td>Acceptable Method for non-employees – Payment Request</td>
<td></td>
<td></td>
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<tr>
<td>Travel, Airfare</td>
<td>Acceptable Method – Submit to Travel using an Early Reimbursement Form</td>
<td>University Policy 3-030</td>
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<td>Travel, Airfare</td>
<td>Restricted Method – Payment Request</td>
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<td>Acceptable Method – Submit to Travel using an Early Reimbursement Form</td>
<td>University Policy 3-030</td>
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<tr>
<td>Travel, Airfare</td>
<td>Acceptable – Payment Request</td>
<td>FBS Index &amp; Glossary - Travel Reimbursement</td>
<td></td>
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<tr>
<td>Travel, Conf. Reg.</td>
<td>Conference Registration Reimbursements (employee, prior to trip)</td>
<td>University Policy 3-030</td>
<td>Preferred Method – Submit to Travel using a Conference Payment Form, Purchasing Card</td>
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<tr>
<td>Travel, Conf. Reg.</td>
<td>Conference Registration Reimbursements (non-employee, prior to trip)</td>
<td>University Policy 3-030</td>
<td>Preferred Method – Submit to Travel using a Conference Payment Form, Purchasing Card; Payment Request</td>
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<tr>
<td>Travel</td>
<td>Early Trip Reimbursements (employee, prior to trip)</td>
<td>University Policy 3-030</td>
<td>Preferred Method – Submit this to Travel using the Early Reimbursement Form.</td>
</tr>
<tr>
<td>Travel</td>
<td>Restricted Method - Payment Request</td>
<td></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>
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</tr>
</tbody>
</table>
| Travel                   | Early Trip 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 – Submit to Travel using an Early Reimbursement Form; Payment Request | University Policy 3-030 |
|                          |                                      | Acceptable - Payment Request           | FBS Index & Glossary – Travel Reimbursement |
| 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. | FBS Index & Glossary – Hotel Prepayment |
|                          |                                      | Restricted 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 |
|                          |                                      | Acceptable - Payment Request           | FBS Index & Glossary – Travel Reimbursement |
| 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                 | Preferred Method for UShop enabled departments-Submit a requisition in UShop | UShop | University Rule 3-100D |
|                          | Preferred Method for expenses totaling more than $5000–Requisition  
Preferred Method for expenses totaling less than $5000–Purchasing Card | UShop | FBS Index & Glossary – Hotel Prepayment |
|                          | Acceptable Method for expenses totaling less than $5000–Limited Purchase Order | UShop | University Policy 3-030 |
| Utility Bills (monthly charges for Gas, Elec., etc.) | Preferred Method for UShop enabled departments-Submit a requisition in UShop | UShop | FBS Index & Glossary – Car Rental  
University Regulations Library – 3-030 |
|                          | 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. | UShop | |
| Vehicle Rentals          | Preferred Method–Keep in on campus by working through Facilities Operations’ Motor Pool  
Preferred Method for trips >100 miles away– Travel Reimbursement | FBS Index & Glossary – Car Rental  
University Regulations Library – 3-030 |
|                          | Restricted Method – Purchasing Card | FBS Index & Glossary – Car Rental  
University Regulations Library – 3-030 | University Policy 3-030 |
<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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<tr>
<td></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 in one year - Purchasing Card.</td>
<td></td>
</tr>
<tr>
<td><strong>Water Services</strong></td>
<td></td>
<td>Preferred Method for expenses totaling less than $5000 - Purchasing Card.</td>
<td></td>
</tr>
<tr>
<td><strong>Workstations not requiring alterations to physical facilities</strong></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>Refer to &quot;Remodeling, Repair or Alterations of University Physical Facilities&quot;.</td>
</tr>
<tr>
<td><strong>Workstations with panels requiring alterations to physical facilities</strong></td>
<td>Provide additional details here.</td>
<td>Refer to &quot;Remodeling, Repair or Alterations of University Physical Facilities&quot;.</td>
<td>Refer to &quot;Remodeling, Repair or Alterations of University Physical Facilities&quot;.</td>
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