

Purchase	Purchase Description	Purchase Order (Purchase)	Purchase Order (non-catalog)	Supplier Contract (PSCs and Subawards)	Stockroom	ProCard	Travel Card/Central Travel Card/Reimbursement	Supplier Invoice Request (Payment Request)	Miscellaneous Payment Request	Special Method	Purchasing Process & Notes	Payee Onboarding (If New Payee)	Preferred Supplier	Policy Links on Process
ADVERTISEMENT - RECRUITMENT, EVENT, PROMOTIONAL		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	If a contract is required or the Terms and Conditions require approval or a signature, a Supplier Contract must be submitted for review and approval by the Contract Specialist regardless of amount.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
AIRFARE - EMPLOYEE, NON-EMPLOYEE, STUDENT, ETC.	Employees, Students, Guests	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Required	Unallowed	Unallowed	N/A	Use Travel Card through Anthony and if you do not have a card then use the Central Travel Card through Anthony.	T&E purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.	Anthony Travel	Travel
ALCOHOL	Alcoholic beverages	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Allowed	Unallowed	Unallowed	N/A	Since alcohol may present risks, events at which it is available should be managed with common sense and due care. Alcohol may not be charged to general funds, sponsored programs, or other restricted funding sources.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Policy Alcoholic Beverage Purchase
ALCOHOL (LAB GRADE)	Alcohol for lab use	Unallowed	Unallowed	Unallowed	Required	Unallowed	Unallowed	Unallowed	Unallowed	N/A	Stockroom requisition form		Stockroom	Purchase from the Stockroom
AMAZON PURCHASES		Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Amazon purchases must be made through the University's Amazon Business Account.	Supplier has been onboarded, no action required.		Amazon Business
ANIMAL FEED		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	ProCard Purchase	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
APPLIANCES		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Appliances purchased must have Energy Star rating.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Low's Home Depot	
ART SUPPLIES		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	ProCard Purchase	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
ATHLETIC & RECREATIONAL SUPPLIES		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	ProCard Purchase	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
EMPLOYEE AWARDS - CASH	Student awards Cash Cash equivalent Tangible items Non-employee awards Cash Tangible items	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Payroll-Required	Any employee cash award must be processed through Payroll. Any cash equivalent award must be reported to Payroll via a Non-Cash Compensation form.	Employee - no action required.		Policy De Minimis Gifts
EMPLOYEE AWARDS - TANGIBLE ITEMS		Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Tangible awards are permitted if the value is less than \$100. Any tangible award \$100 or more should be reported to Payroll via a Non-Cash Compensation form.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Policy De Minimis Gifts
STUDENT AWARDS	Cash, Cash equivalent, tangible items	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Require review with Financial Aid prior to purchase	Any cash/cash equivalent award over \$25 to a student must be reviewed by Financial Aid prior to disbursement. Tangible awards with a value less than \$100 are permitted - value \$100 or more must be tracked for 1099 reporting purposes.			
NON-EMPLOYEE AWARDS - CASH		Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Create supplier invoice request, select supplier, spend category, and worktag for processing then submit. Any cash or cash equivalent award to a non-employee will be tracked for 1099 reporting purposes.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding site for companies.		
NON-EMPLOYEE AWARDS - TANGIBLE ITEMS		Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Any cash or cash equivalent award to a non-employee will be tracked for 1099 reporting purposes.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
BOOKS (CLASSROOM, TEXT)	Books used in the classroom for instructional purposes	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	In cases where the student fee for the books was assessed separately or covered in the registration fee, and the instructor is providing the books.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	University Bookstore	UofT Bookstore
CASH ADVANCES	Requesting cash for a trip	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	See Special Method (Column K)	Unallowed	Unallowed	Create Spend Authorization	Create spend authorization and select cash advance.	No action required.		
CATERING	Food, beverage, and/or service staff	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	If a contract is required or the Terms and Conditions require approval or a signature, a Supplier Contract must be submitted for review and approval by the Contract Specialist regardless of amount. Alcohol is not permitted on restricted funding sources.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Araman/Louis Catering	Policy Alcoholic Beverage Purchase
CELL PHONES	See PUR-41.00 Cellular/Mobile Device and Service Plan Policy	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Service reimbursement paid through Payroll		No action required.		Policy for Cellular/Mobile Device & Service Plan
											Swift Gift Cards should be used for all clinical trial & study payments. For payments of \$100 or less in total value per recipient in a calendar year, departments may provide e-gift cards from approved retailers or a swift gift card. Department staff must maintain proper controls and records regarding new payments are disbarred. The e-Gift Cards Request Form for research study participants must be completed and submitted prior to making any purchases.			
CLINICAL TRIALS	Anyone participating in a research study	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Swift Gift Card		Swift Gift Card		Policy for Payments for Research Study Participants
COMPUTER EQUIPMENT	Personal Desktop Computing (Items valued below \$5,000) Capital Assets (Items valued at \$5,000 or greater)	Required: Dell and GoConnection Punchouts	Allowed with Procurement Services Approval	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	The University has negotiated discounts with computer vendors for purchases by departments and individual faculty and staff. Purchases can be made directly through the vendor web sites by starting a requisition in Workday and purchased out. Create requisition - select Dell or GoConnection Punchout sites, select items, return card, and submit.	Supplier has been onboarded, no action required.	Dell GoConnection	ProCard Policy
COMPUTER PERIPHERALS	Computer peripherals are external devices that connect to a computer to add functionality. They are not part of the core computer architecture (CPU, motherboard, RAM), but they work with the system to help users input data, output information, or store files. (Examples: keyboard, mouse, webcam, monitor, speakers etc.)	Preferred: Dell and GoConnection Punchouts	Allowed	Unallowed	Unallowed	Allowed	Unallowed	Unallowed	Unallowed	N/A	Computer peripherals are external devices that connect to a computer to add functionality. They are not part of the core computer architecture (CPU, motherboard, RAM), but they work with the system to help users input data, output information, or store files. (Examples: keyboard, mouse, webcam, monitor, speakers etc.)			
CONTRIBUTIONS/ DONATIONS	Cash Donations	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Create supplier invoice request, select supplier, spend category, and worktag for processing then submit. Donation must be paid directly to the organization and approved by the department head.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.		Policy Donations
CONSULTING / PROFESSIONALSERVICES / ATTORNEYS	Doctors, employee search firms, nurses, lawyers, engineers, architects, graphic/interior/web site designers, writers, editors, auditors, etc.	Unallowed	Unallowed	Required	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	All Personal Services Contracts require an RFP process prior to establishing a contract; there is no dollar threshold. No longer require a PO.			Personal Service Contracts
COPYRIGHTS		Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Create supplier invoice request, select supplier, spend category, and worktag for processing then submit. Must go through the Office of Technology Transfer to make these types of payments.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.		Intellectual Property
COURIER SERVICES	UPS- check website	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Campus Ship Website	United Parcel Services offers campus ship services through University Mail Services website (provided by Canon) to providing a convenient method to ship parcels.	No action required.	UofT Mail Services (Canon), UPS	Canon Print & Mail Services
DRINKING WATER & EQUIPMENT		Unallowed	Allowed	Unallowed	Required	Allowed	Unallowed	Unallowed	Unallowed	N/A	As a reminder, bottled water should be purchased from the stockroom, this would only relate to someone who has an actual Culligan type water system.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Stockroom	Purchase from the Stockroom
DUES/MEMBERSHIPS	Institutional and Individual Membership to: Civic, Service, Private Club* Professional Organizations Professional Licenses	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A	*Must be reported to the University Tax Department for review of taxability to recipient prior to purchase.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
ENTERTAINMENT CONTRACTS		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A	If a contract is required or the Terms and Conditions require approval or a signature, a DA must be submitted for review and approval by the Contract Specialist regardless of amount.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
EQUIPMENT - CAPITAL	Capital equipment valued at \$5,000 or greater	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	All equipment valued at \$5,000 or greater must be submitted to Inventory Control for tagging.	Supplier has been onboarded, no action required.		Asset Tag Request Form
EQUIPMENT- EQUIPMENT REPAIR & RENTAL- NON-CAPITAL	Equipment valued less than \$5,000	Unallowed	Allowed	Unallowed	Unallowed	Allowed for purchases under \$4,500	Unallowed	Unallowed	Unallowed	N/A	All equipment valued at \$5,000 or greater must be submitted to Inventory Control for tagging.	Supplier has been onboarded, no action required.		Asset Tag Request Form
EXAM FEES	Exams for professional certification or licensure*	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	*Must be reported to the University Tax Department for review of taxability to recipient prior to purchase.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Taxation of Professional Exam Fees Policy

FLOWERS	Administrative Professionals Day Classroom Purposes Congratulatory Funeral/Wedding Employee & Immediate Family Friends/Donors	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	These gifts shall not exceed \$100 and shall be funded from discretionary programs.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Nazco and Kraft, Belmar Flower Shop	No Minimum Gift Policy
FURNITURE	Furniture for classrooms or offices	Unallowed	Allowed	Unallowed	Unallowed	Allowed for purchases under \$4,500	Unallowed	Unallowed	Unallowed	N/A	Furniture with upholstery or fabric furnishings (wall covering, carpet, drapery, etc.) is restricted unless it meets the local standards (CAL 17). Contact UPIC at 802-451-7610 to ensure specifications are met. A full listing of office furniture contracts can be found on the Purchasing website.	Supplier has been onboarded, no action required.	Herman Miller Kimball Celadon Thompson Office Equipment Co. OBI Vico	Furniture Contracts
GASOLINE	Gasoline for university-owned vehicles or equipment	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Fuel Card	No action required.	No action required.	WEX	Fuel Card Program Policy
GASOLINE	1. Gasoline for rental cars/vans for one-day business travel (no overnight hotel stay) 2. Gasoline for group van rental for approved student activities	Unallowed	Unallowed	Unallowed	Unallowed	Allowed	Preferred	Unallowed	Unallowed	N/A	Use of personal vehicles for business travel is discouraged due to liability issues. In cases where a personal vehicle is necessary, justification must be provided on the travel voucher.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	N/A	Travel Policy
GASOLINE	Gasoline for rental cars for multi-day business travel	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	N/A	Use of personal vehicles for business travel is discouraged due to liability issues. In cases where a personal vehicle is necessary, justification must be provided on the travel voucher.	T&E purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.	N/A	Travel Policy
GIFT CARDS	Cards given to individuals for prizes, awards, incentives, appreciation, etc.	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Swift Gift Card	Single merchant gift cards are not permitted. Employee appreciation cards not allowed.	No action required.		Revised Gift Card Policy
GIFTS - TANGIBLE ITEMS (EMPL AND NON-EMPL)	For employee and non-employee	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Any employee cash gift must be processed through Payroll. Any cash equivalent gift must be reported to Payroll via a Non-Cash Compensation form. Tangible gifts are permitted if the value is less than \$100. Any tangible gift \$100 or more should be reported to Payroll via a Non-Cash Compensation form. Retirement gifts have a different threshold - the University Tax Department should be consulted in these situations.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Revised Gift Card Policy
GIFTS - CASH EQUIVALENT (NON-EMPLOYEE)	For employee and non-employee	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Swift Gift Card	Any cash or cash equivalent gift to a non-employee will be tracked for 1099 reporting purposes.	No action required.		Non-Cash Compensation Form
GIFTS - STUDENT	Cash equivalent Tangible items	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed		Require review with Financial Aid prior to purchase	Any cash/cash equivalent gift over \$25 to a student must be reviewed by Financial Aid prior to disbursement. Tangible gifts with a value less than \$100 are permitted - value \$100 or more must be tracked for 1099 reporting purposes.		Student Financial Aid Office Departmental Policies
GROUP TRAVEL	Airfare, Car Rental	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	N/A	Book with Anthony Travel using travel card or central billing card.	T&E purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.		Travel - Anthony Travel - Contact
GUEST EXPENSES (INCLUDING RECRUITMENT)	Expenses paid directly by the University: Hotel Airfare Rental Car	Unallowed	Unallowed	Unallowed	Unallowed	Allowed	Preferred	Unallowed	Allowed - miscellaneous payment for non-employee travel	N/A	Use travel card through Anthony Travel and if you do not have a card then use the Central Billing Card through Anthony Travel. ProCard hotel. Airfare and car rental Anthony travel (central billing.)	T&E purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.	Anthony Travel	Travel - Anthony Travel - Contact
GUEST EXPENSES (INCLUDING RECRUITMENT)	Registration fees and other incidentals	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Allowed - miscellaneous payment for non-employee travel	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Anthony Travel	Travel - Anthony Travel - Contact
GUEST EXPENSES (INCLUDING RECRUITMENT)	Other expenses that need to be reimbursed to the individual (non-employee)	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Allowed - miscellaneous payment for non-employee travel	N/A	Create supplier invoice request, select supplier, spend category, and worktags for processing then submit.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.		Travel
GUEST SPEAKERS/ HONORARIUMS	Fee for speaking services or gestures of goodwill Non-employees only	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Create supplier invoice request, select supplier, spend category, and worktags for processing then submit.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.		
HOTEL/LODGING - EMPLOYEES	Employees	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	N/A	Use Travel Card through Anthony and if you do not have a card then use the Central Travel Card through Anthony.	T&E purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.	Anthony Travel	Travel
HOTEL/LODGING - GUESTS/STUDENTS	Students Guests	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed - miscellaneous payment for non-employee travel	N/A	Use Travel Card through Anthony and if you do not have a card then use the Central Travel Card through Anthony.	T&E purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.	Anthony Travel	Travel
INDUSTRIAL GASES	Oxygen, Acetylene, Propane	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Argos American Welding & Gas Holston Gases Welder's Supply Company	
INSTRUCTIONAL MATERIAL & SUPPLIES	Individual books, reference materials and supplies	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Classroom orders of books should be processed via the University Bookstore	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
INSURANCE	Medical malpractice, Bonding	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A	Other types of commercial insurance, such as property, liability, and workers compensation needs to be acquired by an employee or department; it must be processed through Enterprise Risk & Insurance Office.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Enterprise Risk & Insurance
LAUNDRY	Towels, uniforms, etc.	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Caldwell & Gregory Universal Linen Service	
LABORATORY & MEDICAL SUPPLIES & CHEMICALS		Required - VWR	Allowed (non VWR purchases)	Unallowed	Unallowed	Allowed (non VWR purchases)	Unallowed	Unallowed	Unallowed	N/A	Create requisition - select VWR Purchasing site, select items, return cart, and submit.	Supplier has been onboarded, no action required.		
LEGAL SERVICES	Contracted legal services	Unallowed	Unallowed	Required	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	All Personal Services Contracts require an RFP process prior to establishing a contract, there is no dollar threshold. No longer require a PO.	Supplier must be onboarded using the external supplier prior to supplier contract creation in Workday.	N/A	Personal Service Contracts
LICENSE PERMIT FEES	City, state, federal and/or individual licensing	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A	Please use ProCard unless check is the only accepted form of payment.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
LICENSE (SOFTWARE)	Licenses for software programs	Unallowed	Required if over \$4500	Unallowed	Unallowed	Preferred if under \$4500	Unallowed	Unallowed	Unallowed	N/A	Please purchase via Tech Express if available. If a contract is required or the Terms and Conditions require approval or a signature, a DA must be submitted for review and approval by the Contract Specialist regardless of amount.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
MAIL SERVICES	See also "Postage" Folding, stuffing, labeling, sealing envelopes, etc. Outsourced/3rd Party Mail Service (if approved by Mail Services)	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Canon Services America has an exclusive contract with the University to manage University Mail Services and is the designated provider of these services. You must work with them to use an outside service.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Canon Print Link to
MAINTENANCE		Unallowed	Required if over \$4500	Unallowed	Unallowed	Preferred if under \$4500	Unallowed	Unallowed	Unallowed	N/A	If a contract is required or the Terms and Conditions require approval or a signature, a DA must be submitted for review and approval by the Contract Specialist regardless of amount.			
MEALS - NON-TRAVEL RELATED	*Entertaining Official Guests *Faculty/Staff/Alumni Events & Receptions *Student Orientations/Receptions *On Campus Working Meals *Recruitment (Prospective Employee) *University mission recognition *Entertaining Official Guests *Faculty Orientations/Receptions *Recruitment (Prospective Employee)	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	All activities should have a U of U related business purpose. Meetings should have a planned with a defined, strategic business objective. Whenever possible, meetings should be conducted outside normal meal periods. Entertainment meals may not be reimbursed from federally sponsored programs unless the program specifically permits such expenses. Spouse meals shall be paid from discretionary funds, only when authorized by specific policy or approval of the appropriate Dean or Vice President.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		Travel Policy
MEALS - TRAVEL RELATED	*Business related meals while traveling *Entertaining Official Guests *Recruitment (Prospective Employee) *Entertaining Official Guests *Recruitment (Prospective Employee)	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	N/A	All activities should have a U of U related business purpose. Meetings should have a planned with a defined, strategic business objective. Whenever possible, meetings should be conducted outside normal meal periods. Entertainment meals may not be reimbursed from federally sponsored programs unless the program specifically permits such expenses. Spouse meals shall be paid from discretionary funds, only when authorized by specific policy or approval of the appropriate Dean or Vice President.			
MEETING/CONFERENCE ROOM RENTAL	Rental of space for meetings, recruitment efforts, social functions, etc.	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A	If a contract is required or the Terms and Conditions require approval or a signature, a DA must be submitted for review and approval by the Contract Specialist regardless of amount.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
MEMORIAL GIFTS	Cash donation in lieu of flowers	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Up to \$100 limit.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.		Memorial Gift Policy
OFFICE SUPPLIES	Office supplies are the consumable and reusable items regularly used in offices by employees for administrative, clerical, and organizational tasks. (examples: pens, pencils, highlighters, file folders, envelopes, staples/staples, paper/disc/binder clips, tape/tape dispensers, scissors etc.)	Required - Staples	Allowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	Use the Staples Punchout site while creating a requisition.	Supplier has been onboarded, no action required.	Staples	Purchase of Office Supplies Policy

PARKING FEES - NON-TRAVEL RELATED	Parking fees (flat rates, hourly) incurred during business meetings (same-day trips, no overnight stay)	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Allowed	Unallowed	Unallowed	N/A	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.		
PARKING FEES - TRAVEL RELATED	Parking fees (flat rates, hourly) incurred during business travel (overnight stay)	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Required	Unallowed	Unallowed	N/A	T&E purchases do not require payee to be onboarded. If non-employees/student needs to be reimbursed for travel they will go through the individual supplier registration site.		
PERSONAL SERVICES CONTRACT (PSC) - FOR INDIVIDUAL DEPARTMENTS	See Consulting/Professional Services/Attorneys	Unallowed	Unallowed	Required	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	All Personal Services Contracts require an RFP process prior to establishing a contract; there is no dollar threshold. Individual department PSCs no longer require a PO, just a supplier contract which will be encountered.	Supplier must be onboarded using the external supplier prior to supplier contract creation in Workday.	Personal Service Contracts
PERSONAL SERVICES CONTRACT (PSC) - SHARED BY DEPARTMENTS	Per Diems, Legal, Executive Search Firms, Marketing	Unallowed	Created for payment	Preferred	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	All Personal Services Contracts require an RFP process prior to establishing a contract; there is no dollar threshold. PSCs shared by departments will still have RSC control for payments.	Supplier must be onboarded using the external supplier prior to supplier contract creation in Workday.	Personal Service Contracts
POSTAGE	UPS Overseas Services Departmental mailings Stamps	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Allowed	Unallowed	Unallowed Postal Billing USPS Meter Card, USPS	Canon Services America has an exclusive contract with the University to manage University Mail Services and is the designated provider of these services. You must work with them to use an outside service.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	USPS Mail Services (Canon), UPS Canon Print Log in Page
PROCTORING/NOTE TAKING		Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Any payments to students must be reviewed and approved by Financial Aid if amount is more than \$25.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.	
PRINTING	Printing, graphic design, business cards, letterhead & envelopes, etc.	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	Printing Work Order	Canon Services America has an exclusive contract with the University to manage University Print Services and is the designated provider of these services. You must work with them to use an outside service.		University Print Services (provided by Canon) Canon Print Log in Page
RADIOACTIVE AND OTHER HAZARDOUS MATERIAL		Unallowed	Required	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	The University has a Radiation Safety Office to oversee the purchase, use, disposal, and shipment of radioactive material. They are responsible for obtaining the appropriate Commonwealth of Kentucky licenses.	Supplier must be onboarded through external supplier site.	ASRS Training
REFUNDS - INDIVIDUAL	Payments made to offset an amount that was previously paid to the University by an individual - must have been paid previously to be classified as a "refund" Can also be used for Single Pay Refunds.	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	N/A	Create Request - Select Miscellaneous Payee request to provide information Requestor will be notified once the payee is created then they can submit a miscellaneous payment request. It should be charged to the same program/account as the original payment.	Submit miscellaneous payee request in Workday - use task "create request" and select miscellaneous payee.	
REFUNDS - COMPANY	Payments made to offset an amount that was previously paid to the University by a company - must have been paid previously to be classified as a "refund"	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Create Request - Select Miscellaneous Payee request to provide information Requestor will be notified once the payee is created then they can submit a miscellaneous payment request. It should be charged to the same program/account as the original payment.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.	
REFRESHMENTS FOR DEPARTMENT USE	Food and drink items for departmental business purposes (i.e. bottled water, coffee, Pepsi products, snacks, etc.)	Unallowed	Unallowed	Unallowed	Required	Allowed	Unallowed	Unallowed	Unallowed	N/A	For items not in Stockroom, can also use local grocery stores for purchases of these items - ProCard should be used. As a reminder, Pepsi products are required for on campus events.	No action required for stockroom purchases.	Aramark Stockroom
REGISTRATIONS	Departmental and individual (conference, event & meeting)	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Allowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
RELOCATION EXPENSES	Moving allowances provided to new employees moving to Louisville (MUST be included in offer letter) movement of people, goods and house hunting expenses Expenses Paid Directly to Vendor on behalf of new employee Expenses Reimbursed to the new employee (if prior approval from Purchasing)	Unallowed	Unallowed	Unallowed	Unallowed	Preferred - Purchasing Department ONLY	Unallowed	Unallowed	Unallowed	Allowed - Relocation Reimbursement Form	All movement of goods for new employees must be processed through the University Purchasing Department using the Authorization to Move Form. Authorization requests for new employees and moves must be approved by the Purchasing staff effective January 1, 2025, the Internal Revenue Service (IRS) treats corporate expenses as taxable fringe benefits. All corporate expenses, whether provided in kind or reimbursed directly to the employee, are subject to federal income tax withholding, social security, and Medicare taxes and will be reported in boxes 1, 3, and 5 of the employee's Form W-2.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Berger Allied Moving Expenses Policy
RENTAL CAR	Employees, students, or guests	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	N/A		T&E purchases do not require payee to be onboarded. If non-employees/student needs to be reimbursed for travel they will go through the individual supplier registration site.	
RENTAL (SPACE & FACILITIES)	Rental of space for meetings, recruitment efforts, social functions, etc.	Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	If a contract is required or the Terms and Conditions require approval or a signature, a DA must be submitted for review and approval by the Contract Specialist regardless of amount.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
ROYALTIES		Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	Create supplier invoice request, select supplier, spend category, and worktags for processing then submit. Must go through the Office of Technology Transfer to make these types of payments; typically these payments are made to employees or past employees (unless joint venture with another institution) a 1099 is required.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.	Intellectual Property
SIGNAGE	Safety and Warning Signage (Exit Floor, No Smoking)	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Canon is the contracted vendor of choice and has first right of refusal.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Canon
SOFTWARE (DA IS REQUIRED, REGARDLESS OF AMOUNT OR IF IT IS A RENEWAL)	The term "software" is used universally for anything digital that could potentially contain University information. So, cloud-based services, internet subscriptions, apps, downloads, etc. would be considered software and require a DA before purchase or renewal regardless of amount.	Unallowed	Required if over \$4500	Unallowed	Unallowed	Preferred if under \$4500	Unallowed	Unallowed	Unallowed	N/A	Please purchase via Tech Xpress if available. If a contract is required or the Terms and Conditions require approval or a signature, a DA must be submitted for review and approval by the Contract Specialist regardless of amount.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
STIPENDS	A form of payment for things such as internships or apprenticeships, etc. distinct from a wage or salary because it does not necessarily represent payment for work performed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	N/A	No payments permitted on PRQs to currently enrolled students unless reviewed and approved by Financial Aid Office. Contract represent wages or salaries for individuals who should be placed on the University's Payroll system.	Supplier must be onboarded using the individual onboarding site for individuals and the business onboarding sites for companies.	
STUDENT ACTIVITIES AND EXPENSES (NON-TRAVEL)	Orientations and Receptions, Department Graduations paid directly to supplier	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Please be mindful that any expenses that are paid on behalf of a student or reimbursed to a student must be approved by the Financial Aid Office in advance of purchase. After Financial Aid approval has been, please notify the ProCard office prior to purchase.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Student Financial Aid Office Departmental Policies
STUDENT ACTIVITIES AND EXPENSES (TRAVEL)	Travel & Expense for students	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	N/A	Please be mindful that any expenses that are paid on behalf of a student or reimbursed to a student must be approved by the Financial Aid Office in advance of purchase. After Financial Aid approval has been, please notify the ProCard office prior to purchase.	T&E purchases do not require payee to be onboarded. If non-employees/student needs to be reimbursed for travel they will go through the individual supplier registration site.	Student Financial Aid Office Departmental Policies
SUBGRANT CONTRACTS (SPONSORED PROGRAMS AND GRANTS)	Work through the Executive Vice President for Research & Innovation Office (EVRIO)	Unallowed	Unallowed	Required	Unallowed	Unallowed	Unallowed	Unallowed	Unallowed	N/A	All Subgrant Contracts require an RFP process prior to establishing a contract; there is no dollar threshold. No longer require a PO.	Supplier must be onboarded using the external supplier prior to supplier contract creation in Workday.	
SUBSCRIPTIONS	Departmental and individual (Magazines, newspapers)	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
SUBSIDIES/SPONSORSHIPS		Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
TEMPORARY HELP		Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A	Please work through Human Resources. NOTE: Use of a temporary agency utilizing general funds are subject to any authorization process and/or any budget committee review that may be in place by the University.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Vaco, Diskenet, Facilities Management Services, Healthcare Staffing Professionals, HR Affiliates, iRecruiter, Ono Systems, Premier Staffing Source, 22nd Century Technologies
TOOLS/HARDWARE		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Lowes Home Depot
TOURNAMENT/COMPETITION FEES		Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
TRAINING/WORKSHOPS		Unallowed	Allowed	Unallowed	Unallowed	Preferred	Unallowed	Unallowed	Unallowed	N/A		ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	
UTILITIES	Cable/Satellite TV Water Gas Electric Phone	Unallowed	Unallowed	Unallowed	Unallowed	Preferred	Unallowed	Allowed	Unallowed	N/A	The University also provides the option for utility companies to debit our bank account for monthly charges. Please work through the Treasury Management department.	ProCard purchases do not require payee onboarding before making the purchase. Supplier must be onboarded through the onboarding site if a PO or supplier invoice request will be used.	Treasury Management Forms

Important Notes:

If a contract is required or the Terms and Conditions require approval or a signature, a CA must be submitted for review and approval by the Contract Specialist regardless of amount.

Any purchase made on behalf of students or expenses that are paid on behalf of a student or reimbursed to a student must be approved by the Financial Aid Office in advance of purchase. As this may have an impact on their anticipated aid.

Supplier Onboarding (If New Supplier) Notes:

ProCard purchases do not require payee onboarding before making the purchase. Suppliers must be onboarded through the onboarding site if a PO or supplier invoice request will be used. Use of the ProCard to circumvent the supplier being onboarded for payment via PO or supplier invoice request is prohibited.

TBE purchases do not require payee to be onboarded. If non-employee/student needs to be reimbursed for travel they will go through the individual supplier registration site.