Guidelines for Purchasing Goods and Services

There are a number of methods available to purchase goods and services on behalf of the University. This summary is to provide guidance on which method to use under various circumstances. For more detailed instructions on making purchases on behalf of the University, please visit the Procurement Department website.

Purchase Requisitions / Purchase Orders
Purchase Requisitions and Purchase Orders should generally be used for all purchases of goods and services. The Procurement Department will work with the requesting department to obtain competitive bids, if required. A Requisition should be initiated at the time a product or service needs to be ordered, not when it is time to pay for the product or service. Initiating a Requisition ensures that an approved Purchase Order is issued. The Purchase Order includes the University’s standard terms and conditions, specifying each party’s rights and obligations, and is the legal document that governs the transactions and minimizes risk to the department/college and University. The Purchase Order is sent to the vendor by the requesting department.

The use of a Purchase Order is important for budgetary purposes, as it ensures funds are available prior to a financial commitment being made. Also, Purchase Orders are an important tool to capture historical vendor information in Banner.

All hardware and software purchases require a purchase order and approval from OTS.

Some purchases of equipment may require coordination with the Facilities Department.

Blanket Purchase Orders
A Blanket Order may be used to purchase goods and services when only the estimated amount of money to be spent over a specified period of time is known (e.g. service and maintenance contracts). While a representative list of items to be purchased should be identified, the actual quantities and type of items as well as specific prices may be unknown when the purchase order is established. In addition, Blanket Orders may be used to purchase goods and services when an annual contract is in place, which may require monthly or quarterly payments (e.g. leases).

Order for Check
An Order for Check is generally used to request payments for expenses to vendors that cannot be accommodated through the use of a Purchase Order. This form is managed and reviewed by Accounts Payable / Financial Accounting. The following is a list of items that may be purchased using an Order for Check:
- Travel Advances
- Honorariums
- Goods/Services that have already been received and/or completed without a prior Purchase Order (there must be justifiable circumstances as to why a Purchase Order was not initiated, and such orders will be reviewed by both Financial Accounting and the Procurement Department)
P-Card
P-Cards cards should generally only be used for travel expenses, conference registrations, dues, memberships, subscriptions (excluding software subscriptions), and for minor purchases such as supplies.
Going forward, some of the University’s larger vendors (e.g. Aramark, WB Mason, Crystal Rock) will not require a P-Card number when a purchase is made. Employees placing an order will simply provide department/account information, and those vendors will provide a summary bill each month to be paid by the Accounts Payable Department.

Cash Advances
Cash Advances may be granted to regular full-time/part-time, University employees, or student agency organizations, for out of pocket expenses expected to be incurred that cannot be paid by a University P-Card. A single advance should not exceed $750 and must be reconciled using a Travel and Expense Voucher within 30 days of the conclusion of the trip or event. Cash Advances are managed and reviewed by Accounts Payable / Financial Accounting.