

# PURCHASING GUIDELINES

**Travel** - there are Travel Registration Request forms for University members and Visitors on the P&A Department internal website.

**Ushop** is the University preferred method for purchases. **Physics & Astronomy requires frequent shoppers to use Ushop.** Ushop requests will be reviewed for final submission by the Accounting Office. **To get set up, email [physicsaccounting@utah.edu](mailto:physicsaccounting@utah.edu).**

## Check-out a Department Pcard (University credit card)

*\*See Restricted Item list on next page*

- 1) Must present UCard when checking out Pcard, and present to vendor for ID
- 2) Funding source must be identified and pre-approval is required
- 3) Expenses must be reasonable
- 4) Tax may not be charged to Pcard
  - a. Use tax exempt friendly restaurants (we have a list, or call ahead)
  - b. If tax is charged
    - i. The person who checked out the card is responsible to get tax refunded
    - ii. If vendor is not cooperative the person who checked out the card must reimburse the department with personal funds
- 5) Costco will accept Visa - and the department has a Costco Membership. Costco will not honor tax exemption on a personal Costco membership - but we do have a department membership card that may be checked out and used with the Pcard for tax exemption.
- 6) [Meals require a Business Meal Documentation Form](#) - see form on our internal website
  - i. Attendees must be listed - with role - (speaker, grad student, faculty, etc.)
  - ii. A detailed business purpose must be provided
  - iii. Detailed Original Receipt
  - iv. Alcohol must be identified

## Reimbursements

Using personal funds for university related business should be a last resort. **Individuals are not tax exempt**, and therefore it is unlawful to invoke the University tax exemption if personal funds are used. **Tax will not be reimbursed** when personal funds are used unless it can be verified that all department PCards have been checked out. Also, the use of personal funds puts the purchaser at risk of not being reimbursed if the account executive of the funding does not approve the purchase after the fact.

## Purchases \$10,000 and Over

Purchases (single or multiple items) to a single vendor must include [3 competitive bids](#) or include a [sole source request](#) to be evaluated by the purchasing department. This process can take several weeks so start early. \*\*\*Splitting invoices or orders to avoid this process is a violation of University Policy and may result in disciplinary action.

**Fabricated Equipment** - if your purchase is part of a fabricated equipment project, the asset number must be included with all purchase requests.

**Inventory** - any single item costing \$1,000 - \$4,999.99 must be recorded as inventory (this includes equipment, but also furniture and other items).

# Purchasing Card Restricted List

The cardholder is ultimately responsible for restricted purchases found within (1) **University Rule 3-100D** outlining PCard policy, (2) **University Rule 3-100E** governing University general purchasing restrictions, and (3) this comprehensive list. The individual funding source or department may add to restricted items within their policies.

All items below are **RESTRICTED**.

**Common Violations in Yellow**

- 7.8 **ADVERTISEMENTS FOR HUMAN RESOURCE RECRUITING** — This includes staff and faculty positions — Must have HR PRN number attached to the invoice with PCard statement
- 7.8 **AUTOMOBILE EXPENSES** — This includes employee parking on campus, parking fines, gas, and fuel
- 7.8 **CONSTRUCTION OR REMODELING**
- 7.8 **CONTINUING EDUCATION AND COURSES AT THE U** — Tuition costs should be paid through Scholarship Administration
- 7.8 **CONTROLLED SUBSTANCES** — This includes DEA items, radioactive substances, gases, and ethyl alcohol
- 7.8 **EMPLOYEE INCENTIVES/BENEFITS**
- 7.8 **FABRICATED AND CAPITAL EQUIPMENT**
- 7.8 **GIFT CARDS THAT ARE MONETARY EQUIVALENTS** — Visa, MasterCard, AMEX
- 7.8 **GIFTS, PRIZES, AND AWARDS** — This includes Gift Certificates, Flowers, and Gift Cards — Please contact the PCard Department for approval
- 7.8 **IMPORTS THAT REQUIRE CUSTOMS CLEARANCE** — Foreign purchases that **do not** require customs clearance are allowed
- 7.8 **LIVE ANIMALS** — Including but not limited to research, display/entertainment, rental, or other purposes
- 7.8 **NEW MEMBERSHIPS** — New organization/association memberships — Please contact the PCard Department for approval
- 7.8 **PERSONAL PURCHASES** — For yourself, University employees, or others
- 7.8 **SPECIAL SERVICES** — Independent Contractors, performers, consultants, speakers, honorarium, and legal fees
- 7.8 **STUDENT SERVICES** — This includes events, travel, tuition, scholarships, textbooks, health insurance, and stipends
- 7.8 **TELEPHONE EQUIPMENT** — Installation or service on campus and/or individual cell phone costs
- 7.8 **TRAVEL** — *University Employees and Students*. This includes:
  - = Airline Tickets
  - = Inflight Wi-fi or Internet Services
  - = Lodging — Hotels, motels, and houses (including deposits or holds)
  - = Vehicle rental, shuttle, and taxi services — Self-serve moving trucks are allowed
  - = Meals
  - **TRAVEL** — *Visitors to the University*. This includes:
    - = Airline Tickets
    - = Lodging — Hotels, motels, houses (including deposits or holds) — University Guest House is allowed
    - = Vehicle rental — Local shuttle services are allowed
  - **USE OF UNIVERSITY NAME/LOGO** — All vendors must be approved by the Trademark & Licensing Office for printing and distributing items with the University Name and Logo

