



Purchasing Guidelines

All expenditures require a business purpose that supports the mission of the SOMD and the University of Oregon. Forms are located here: <https://blogs.uoregon.edu/somdaccounting/>.

Computers & Equipment

- All computer purchases are coordinated through the User Support Services team.
- Reimbursements are **NOT** allowable for computer, software, or equipment purchases.

General Purchasing

- All purchases must be reviewed and approved by someone with Level 1 or Level 2 contracting authority (Jim or Melynn) **prior to ordering**.
- **NEVER SIGN ANY** documents. Please submit them to the SOMD Accounting Office for processing and allow up to five weeks for processing.
- A written contract is required for personal/professional services of **any dollar amount** and must be completed by someone with contracting authority (see personal/professional services contracts below).
- Any purchase exceeding \$5,000 must be documented by a written contract or purchase order **before** making the purchase.
- If making a direct purchase using an SOMD index or account, submit your **original, itemized receipt** to the SOMD Accounting Office immediately after purchase (examples include The Duck Store and UO Catering). The business purpose must be clearly documented and submitted with the receipt.
- For purchases that require a purchase order, please contact the SOMD Accounting Office.
- Submit all invoices to the SOMD Accounting Office with the business purpose and source of funds clearly documented.
- If you receive an order by mail, submit all packing slips to the SOMD Accounting Office with your signature verifying the items have been received.
- If a purchase exceeds \$25,000, a procurement process will need to be completed. This will require additional processing time.

Hosting

- Actual and reasonable cost will be paid using the travel per diem rates as the basis of comparison for reasonableness. Current rates can be found here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>.
- The date, location, business purpose, and list of attendees must be clearly documented and submitted with the receipt.
- **Original, itemized receipts** showing **proof of payment** are required.
- Alcohol is **NOT** allowable unless prior approval has been given for the use of UO Foundation funds.
- Gratuity is limited to 15% of the allowable expense unless included in the bill.
- Employee family member meals are not reimbursable.

Personal/Professional Services Contracts

- A written contract is required for personal/professional services of **any dollar amount** and must be completed by someone with contracting authority.
- A Personal Services Contract is required in order to pay honorariums to guest artists, visiting lecturers, presenters, musicians, etc.
- Submit your request by completing the SOMD Request for Personal Services Contract form.
- Contract requests should be submitted at least 5 weeks prior to the anticipated contract start date.
- After-the-fact contracts are not acceptable. Please plan in advance.

Property Ownership

- All items purchased with University funds remain the property of the UO. This includes purchases that combine funds, and applies even if the majority of funds are from another source, such as a person's personal income.

Refreshments/Food at Meetings

- Refreshments are allowed for specific business purposes such as a training, workshop, departmental staff retreat, or employee working meal with documented agenda. The function must be scheduled to last at least **two hours** and can't be a regularly scheduled meeting. Please check with the SOMD Accounting Office in advance for approval.
- You must use UO Catering unless a waiver is obtained. An exception is allowed for food and beverages that will be consumed by department affiliated individuals only.
- When submitting your invoice for payment, please provide the SOMD Accounting Office with a copy of the **meeting agenda, list of attendees, and business purpose**.

Reimbursements

- Complete a Request for Reimbursement Form, attach original receipt, and submit to the SOMD Accounting Office within **30 days** of purchase.
- **Original, itemized receipts** showing **proof of payment** are required.
- The business purpose must be clearly documented on the form.
- Include a list of attendees and agenda when applicable.
- Services must be paid directly to the vendor and can **NOT** be reimbursed.
- Minor equipment such as computers, monitors, electronics, printers, AV equipment, and software should be purchased directly from the vendor for warranty purposes. These expenses are **NOT** reimbursable.
- If you have a question as to whether something is reimbursable, please contact the SOMD Accounting Office prior to making the purchase.

Student Employees

- Do **NOT** have students do any work before they are completely set up on payroll.
- Complete a Request to Hire Students/Temps form at least two weeks prior to the employee's projected start date.