

# PROCUREMENT METHODS

This matrix is intended to aid in identifying the appropriate process for purchasing goods or services

TRANSACTION TYPE	REQUISITION	CHECK REQUEST	P-CARD <i>Adherence to the P-Card Policy is required</i>	PROHIBITED USE
<b>Advertisements</b>	X	X	X (less than \$1000)	
<b>Alcoholic Beverages, Ammunitions, Controlled Substances, Firearms, Narcotics</b>				X
<b>Chemicals/Hazardous Materials (See EHS's SOP for details)</b>	X		X (EHS pre-approval may be required)	
<b>Computers (Requires IT Authorization Number)</b>				
<ul style="list-style-type: none"> <li>• Touchpads, notebooks, desktops, laptops, servers, etc., valued under \$5,000 (unit price inclusive of sales tax). See instructional equipment below.</li> </ul>	X (\$5000 and over)		X (less than \$5000)	
<b>Consulting Services</b>	X			
<b>Contracts/Agreements/MOU's</b>				
<ul style="list-style-type: none"> <li>• Agreements related to P Card purchases (Requires Q#)</li> </ul>			X	
<ul style="list-style-type: none"> <li>• Licenses/Maintenance/Service/Renewal Contracts (i.e., Copiers, Software License Renewals)</li> </ul>	X			
<ul style="list-style-type: none"> <li>• Formal Agreements (Contract Request Form Required)</li> </ul>	X			
<b>Equipment (All IT related equipment requires IT Authorization Number)</b>				
<ul style="list-style-type: none"> <li>• Equipment valued under \$5,000</li> </ul>	X		X	
<ul style="list-style-type: none"> <li>• Equipment valued at \$5,000 and over (unit price inclusive of sales tax), with or without installation. Asset Management Office must be notified of purchase to update campus property inventory records.</li> </ul>	X			
<ul style="list-style-type: none"> <li>• Instructional Equipment valued at \$5,000 or more (unit price inclusive of applicable tax, freight, delivery, installation, etc.). The Asset Management Office will record in the campus property inventory records.</li> </ul>	X			
<b>Fees</b>				
<ul style="list-style-type: none"> <li>• Accreditation fees and expenses including lodging, meals, transportation, expenses required by accreditation</li> </ul>		X	X	
<ul style="list-style-type: none"> <li>• Submission fees: publishing papers in academic journals/publications</li> </ul>		X	X	
<b>Film and video rentals</b>	X		X (Q# Required)	
<b>Furniture</b>				
<ul style="list-style-type: none"> <li>• All orders \$1,000 and under (total cost of the order). Q# is required if the order includes assembly, disassembly, and installation services.</li> </ul>			X	

TRANSACTION TYPE	REQUISITION	CHECK REQUEST	P-CARD Adherence to the P-Card Policy is required	PROHIBITED USE
<ul style="list-style-type: none"> <li>All orders greater than \$1,000 (total cost of the order) that include assembly, disassembly, and installation services.</li> </ul>	X			
<b>Gifts or items of a personal nature / Purchases for personal use</b>				X
<b>Gift cards</b>				X
<b>Meals / Refreshments (Refer to On Site Approved Caterers List)</b>				
<ul style="list-style-type: none"> <li>Catering services / on campus delivery (Q# Required)</li> </ul>			X	
<ul style="list-style-type: none"> <li>Curbside delivery or pick-up</li> </ul>			X	
<b>Memberships (no personal reimbursements)</b>		X	X	
<b>Public Works / Facilities Planning</b>	X			
<b>Registrations (Event, conference, etc.)</b>			X	
<b>Services</b>				
<ul style="list-style-type: none"> <li>Campus services: (e.g., food services, space rental, etc.)</li> </ul>			X	
<ul style="list-style-type: none"> <li>Services of any nature performed on or off campus (i.e., installations, printing and shredding services, equipment repairs, etc.)</li> </ul>	X		X (Q# Required)	
<b>Speaker</b>				
<ul style="list-style-type: none"> <li>Payments for non CSUF personnel for on campus events (Honorary form needed)</li> </ul>		X	X	
<ul style="list-style-type: none"> <li>Payments to Speakers doing business as a company</li> </ul>	X			
<b>Software</b>				
<ul style="list-style-type: none"> <li>All software, licenses and subscriptions.</li> </ul>	X		X (Q# Required)	
<ul style="list-style-type: none"> <li>All software leases, licenses, renewals, maintenance and support and library subscriptions/periodicals paid in advance of Fiscal Years (prepaids).</li> </ul>	X			
<b>Subscriptions (magazines, periodicals, and journals)</b>		X	X	
<b>Travel Expenses (Accounts Payable &amp; Travel Website)</b>			X	
<b>Venue Rental</b>			X	
<ul style="list-style-type: none"> <li>Room block agreements (no venue rentals)</li> </ul>	X			