PURCHASING POLICY

Section: Business Operations

Policy: This policy outlines the process for University Housing staff to purchase items and/or obtain services utilized within the department. University Housing follows all UGA procurement and foundation purchasing policies.

Purpose: To establish University Housing purchasing procedures encompassing appropriate supervisor approvals along with submission timelines.

Scope: This policy applies to all staff (including student staff) purchasing on behalf of University Housing.

Resource: Purchasing Approval Jotform: Facilities, RPS, ASC and EDO

Procedure:
I. Approvals needed prior to beginning the purchasing process (allow additional time for obtaining approvals prior to beginning the purchasing process in Section II.):
   A. Please read through the following items to ensure additional approvals are not required for purchase. If none of the preapprovals apply, proceed to Procedure II.
   B. Staff recognition, awards and retirement events:
      1. For official (e.g., years of service awards) award programs: email hsg-business@uga.edu a completed Recognition and Awards Program Form (excluding signatures).
         a. Allow five days for obtaining approvals.
         b. Once approved, proceed to Section I. C. for food purchases and/or Section II. A. for non-food purchases (e.g., decorations).
      2. For other general recognition and retirement event purchases:
         a. Proceed to Section I. C. for food purchases and/or Section II. B. for non-food purchases.
   C. Staff food for recognition/retirement events:
      1. Email hsg-business@uga.edu a completed Group Meal Form (excluding signatures).
         a. Include sales tax in the estimate**.
         b. Allow five days for obtaining approvals.
         c. Once approved, proceed to Section II. B.
   D. Staff food for business meetings/safety products:
      1. Email hsg-business@uga.edu a completed Group Meal Form (excluding signatures).
         a. Business meetings must be four+ hours and meal cannot be at the beginning or end of meeting.
         b. Allow five days for obtaining approvals.
         c. Once approved, proceed to Section II.
   E. Candidate food:
      1. Email hsg-business@uga.edu a completed Group Meal Form (excluding signatures).
         a. Include sales tax in the estimate**.
         b. One staff host per candidate meal.
c. Candidate meal limits are $13 for breakfast, $14 for lunch and $23 for dinner, per person, including tax/tips.

d. Allow five days for obtaining approvals.

e. Once approved, proceed to Section II. D.3.a. or E.3.

F. Purchase(s) using a University of Georgia logo:
1. Reference the Identity Policy.
2. Once trademark usage has been approved, begin the purchasing process in Section II.

G. Travel/vehicle rental: reference the employee and/or non-employee travel policies.

H. IT equipment/supplies:
1. Reach out to IT.
2. Proceed to Section II. A. if advised by IT.

I. Inventory item trade-ins:
1. Reach out to hsg-business@uga.edu for trade-in approval.
2. Proceed to Section II. A.

J. Safety glasses: reference the Uniform policy.

K. Any purchases (except facilities plant fund projects) anticipated to exceed $25,000: Reach out to hsg-business@uga.edu. Allow 30 days for obtaining approvals.

II. Ways to purchase:
A. UGAmart: To buy goods and/or services prior to receipt (preferred method of purchasing):
1. Log into UGAmart:
   a. Punchout items (e.g., Amazon, Staples, Lowe's, CDW)
      i. Save items to a cart
      ii. Submit a Purchasing Approval Jotform at least 10 business days prior to the intended date needed.
   b. Non-catalog items (e.g., Newton Ray, Taziki's, Alliance, Athens Janitor)
      i. Obtain a quote from vendor (for approved trade-ins, quote should show items to be traded in, as well as cost reduction (if any)).
      ii. Submit a Purchasing Approval Jotform at least 15 business days prior to intended date needed.
      iii. For rentals and/or vendors that include terms and conditions (must be processed via UGAmart): submit a Purchasing Approval Jotform 20 days prior to intended date needed (e.g., Interactive Attractions, Saucehouse, Time2Play Inflatables).
2. After good/service received, submit invoice to hsg-business@uga.edu within five business days.

B. Payment request: To process payment for a good/service after receipt (generally limited to purchases less than $2,499):
1. For non-community council purchases or purchases without an approved Group Meal or Recognition and Awards Program form: obtain approval by emailing the supervisory chain up to unit director prior to purchase.
2. Utilize a vendor card*, Publix card or Kroger card for purchase (this step does not apply to FAC in most cases).
3. Obtain invoice from vendor without sales tax for all purchases except official staff recognition, general staff recognition and retirement purchases**.

4. Submit Purchasing Approval Jotform no later than five business days after the invoice date.

* A list of vendors that will accept a vendor card for goods/services is saved on the server. For units outside of RPS, please reach out to hsg-business@uga.edu when a vendor, Kroger or Publix card is needed.

C. P-card:
1. Submit a Purchasing Approval Jotform at least 10 business days prior to the intended purchase date.
2. Facilities only: emergency p-card purchases under $1,000 may proceed without completion of a Purchasing Approval Jotform

D. Direct Charge/Intra University Charge
1. UGA Bookstore - Submit a Purchasing Approval Jotform at least 10 business days prior to the intended date needed.
2. Tate Print and Copy and Campus Reservations - Submit a Purchasing Approval Jotform within one business day after the order has been placed with the associated campus partner.
3. Dining Services
   a. Candidate meal:
      i. Staff host will obtain invoice with sales tax from Dining Services**.
      ii. Submit Purchasing Approval Jotform within five business days after the meal.
   b. Other: Please reach out to HBHR prior to purchase.
4. Georgia Center Hotel - Reference Staff/Student Use of Georgia Center For Continuing Education and Hotel policy.
5. FMD and EITS purchases/services do not require Purchasing Approval Jotform submissions. Applicable staff will review charges on monthly status reports.

E. Reimbursement
1. Personal reimbursement: This payment method type is not a preferred method of payment and is strongly discouraged. Reimbursement for using personal funds will be determined on a case-by-case basis. Please reach out to HBHR purchasing manager via email before utilizing this payment method type.
2. Travel reimbursement: Please reference the employee and/or non-employee travel policies.
3. Candidate meal reimbursement:
   a. Staff host will pay for meals and obtain an itemized receipt with sales tax**.
   b. Staff host will seek reimbursement by submitting a Purchasing Approval Jotform within five business days after the meal.

III. Additional information
A. Email hsg-business@uga.edu to get a new supplier registered to do business with UGA.

**Processed using a University Housing Foundation fund source.

Created and approved by management team: July 16, 2024