

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