



## UNIVERSITY POLICY

**SUBJECT:** ADMINISTRATION

**TITLE:** APPROVING PURCHASING &  
PAYMENT TRANSACTIONS

**CODING:** 00-01-10-135:00

**ADOPTED:** 07/01/99

**AMENDED:** 07/01/99

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### I. PURPOSE

To establish uniform approval guidelines for processing purchasing or expense reimbursement requests for the purpose of expediting the time it takes from initiating the request to the completion of transaction.

### II. ACCOUNTABILITY

Under the direction of the Senior Vice President for Academic Affairs and the Senior Vice President for Administration and Finance, the Deans and Vice Presidents shall ensure compliance with this policy. The Department Chairs, Directors and Principal Investigators shall implement this policy.

### III. REFERENCES

1. Requisition and Processing [00-01-55-15:00](#)
2. Quick Purchase Order Program [00-01-55-80:00](#)
3. Travel Related Expenses Reimbursements [00-01-50-10:00](#)

### IV. POLICY

Departmental approvals of purchase requisitions and expense approval transactions shall be accomplished within three (3) days from the date of document preparation to delivery to the Purchasing or Accounts Payable department. The scope of the approval guidelines will pertain to the following documents:

1. Purchase Requisitions
2. Quick Purchase Orders
3. Honoraria
4. Travel Approval/Advance Report
5. Travel Expenditure Report
6. Request for Check-Expenses Reimbursement, and
7. Request for Check - Other

The guidelines specified in Exhibit I. shall be followed for transactions affecting use of Unrestricted and Discretionary funds. The guidelines specified in Exhibit II. shall be followed for transactions affecting use of Restricted funds.

V. EXHIBITS

- A. Approval Guidelines for Purchasing & Payment Transactions: Unrestricted and Discretionary Funds
- B. Approval Guidelines for Purchasing & Payment Transactions: Restricted Funds

By Direction of the President:

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Vice President for Administration

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Vice President for Finance and Treasurer

**EXHIBIT A**  
**APPROVAL GUIDELINES FOR PURCHASING & PAYMENT TRANSACTIONS:**  
**UNRESTRICTED AND DISCRETIONARY FUNDS**

<b>Document Type</b>	<b>Level of Approval Required on Unrestricted and Discretionary Funds</b>
<b>Purchase Requisitions</b>	<ul style="list-style-type: none"> <li>• Requisitions under \$2,000 - Department Administrator (or equivalent)</li> <li>• Requisitions \$2,000 and over - Department Chairperson/Director (or designee).</li> <li>• All requisitions are submitted electronically to the Business Office for fund approval.</li> </ul>
<b>Quick Purchase Orders</b>	<ul style="list-style-type: none"> <li>• Should be approved by individual assigned as approved signatory by the Purchasing Department. The normal paper flow and data entry requirements remain unaffected by this process.</li> </ul>
<b>Honoraria</b>	<ul style="list-style-type: none"> <li>• Check requests for Honoraria should be approved by the Department Chairperson/Director (or designee). Documents require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment.</li> </ul>
<b>Travel Approval/Advance Report Travel Expenditure Report</b>	<ul style="list-style-type: none"> <li>• Chairperson/Director as requestor - Dean (or designee)</li> <li>• All other requestors - Department Chairperson/Director (or designee)</li> <li>• All Travel Approval/Advance Reports and Travel Expense Reports require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment.</li> </ul>
<b>Request for Check - Employee Reimbursement</b>	<ul style="list-style-type: none"> <li>• Chairperson/Director as requestor - Dean (or designee)</li> <li>• All other requestors - Department Chairperson/Director (or designee)</li> <li>• All employee reimbursements require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment</li> </ul>
<b>Request for Check - Other</b>	<ul style="list-style-type: none"> <li>• Requests under \$2,000 - Department Administrator (or equivalent)</li> <li>• Requests \$2,000 and over - Department Chairperson/Director (or designee)</li> <li>• All Request for Check documents require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment.</li> </ul>

**EXHIBIT B**  
**APPROVAL GUIDELINES FOR PURCHASING & PAYMENT TRANSACTIONS:**  
**RESTRICTED FUNDS**

<b>Document Type</b>	<b>Level of Approval Required on Restricted Funds</b>
<b>Purchase Requisitions</b>	<ul style="list-style-type: none"> <li>• All requisitions - Principal Investigator</li> <li>• All requisitions are submitted electronically to the Business Office or Grants Department (as previously identified) for funds approval.</li> </ul>
<b>Quick Purchase Orders</b>	<ul style="list-style-type: none"> <li>• Should be approved by individual assigned as approved signatory by the Purchasing Department. The normal paper flow and data entry requirements remain unaffected by this process.</li> </ul>
<b>Honoraria</b>	<ul style="list-style-type: none"> <li>• Check requests for Honoraria should be approved by the Department Chairperson/Director (or designee). Documents require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment.</li> </ul>
<b>Travel Approval/Advance Report Travel Expenditure Report</b>	<ul style="list-style-type: none"> <li>• Principal Investigator and Department Chairperson/Director (or designee) should approve all requests against restricted funds.</li> <li>• All foreign travel requires approval by the Dean (or designee).</li> <li>• All Travel Approval/Advance Reports and Travel Expense Reports require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment.</li> </ul>
<b>Request for Check - Employee Reimbursement</b>	<ul style="list-style-type: none"> <li>• Principal Investigator and Department Chairperson/Director should approve all requests against restricted funds</li> <li>• All employee reimbursements require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment</li> </ul>
<b>Request for Check - Other</b>	<ul style="list-style-type: none"> <li>• All - Principal Investigator</li> <li>• All Request for Check documents require Business Office or Grants Department Fund Approval before submission to Accounts Payable for payment.</li> </ul>