

## Purchasing Requirements for SOG Businesses

UNC SOG		SOG Services		SOG Foundation	
<b>CREDIT CARDS</b>					
<b>Credit Card</b>	P-card (Provide receipt, chartfield string in BOA Works) T&E Card for business meals and professional dues (Provide receipt, chartfield string in Concur)	Ramp Card (Provide Receipt and Cost Code in Ramp)	Pcard (Provide receipt, chartfield string in BOA Works) or SOG Foundation Civic Card (Provide receipt and business purpose to Foundation Accountant)		
<b>INDEPENDENT CONTRACTORS</b>					
<b>One-week speaker less than \$5,000</b>	•Speaker Checklist •W-9	•SOG Services Speaker Checklist •W-9	•Speaker Checklist •W-9		
<b>Community collaborator less than \$5,000</b>	•Collaborator Checklist •W-9	•SOG Services Collaborator Checklist •W-9	•Collaborator Checklist •W-9		
<b>IC less than \$10,000</b>	•Employee/Independent Contractor Determination Checklist •W-9 •Background check if working with students	•SOG Services Contracted Service Authorization and Approval Form •W-9 •Scope of Work	•Employee/Independent Contractor Determination Checklist •W-9 •Background check if working with students •Scope of Work		
<b>IC greater than \$10,000</b>	•Employee/Independent Contractor Determination Checklist •W-9 •Customer Request for a Brand/Vendor Specific Waiver of Competition •Independent Contractor Service Agreement •Statement of Work •Background check if working with students	•SOG Services Contracted Service Authorization and Approval Form •W-9 •Independent Contractor Services Agreement •Scope of Work	•Employee/Independent Contractor Determination Checklist •W-9 •Customer Request for a Brand/Vendor Specific Waiver of Competition •Independent Contractor Service Agreement •Statement of Work •Background check if working with students		
<b>GOODS AND SERVICES</b>					
<b>Goods or Services Less than \$5,000</b>	•Invoice •Vendor setup forms: W-9, HUB Form, & ACH	•Invoice •W-9	•Invoice •W-9 •Approval from Foundation Treasurer >\$2,500		
<b>Goods or Services between \$5,000 and \$25,000</b>	•Quote (Recommended: obtain pricing from multiple sources) •Requisition and Purchase Order (PO) •Vendor setup forms: W-9, HUB Form, & ACH	•Invoice •W-9 •Quote or agreement signed by SOG Services Director	•Invoice •W-9 •Quote or agreement signed by Foundation Director/Dean		
<b>Goods or Services between \$25,000 and \$100,000</b>	•3 quotes through official University RFQ prepared by Purchasing Services or Waiver of Competition form •Requisition and Purchase Order (PO) •Vendor setup forms: W-9, HUB Form, & ACH	•Invoice •W-9 •Quote or agreement signed by SOG Services Director •Statement of Work (recommended)	•Invoice •W-9 •Quote or agreement signed by Foundation Director/Dean •Statement of Work (recommended)		
<b>Goods or Services exceeding \$100,000</b>	•3 quotes through official University RFQ prepared by Purchasing Services or Waiver of Competition form •Requisition and Purchase Order (PO) •Detailed Statement of Work •Vendor setup forms: W-9, HUB Form, & ACH •Detailed Evaluation criteria	•Invoice •W-9 •Quote or agreement signed by SOG Services Director •Statement of Work	•Invoice •W-9 •Quote or agreement signed by Foundation Director/Dean •Statement of Work		
<b>HOTEL AND CATERING AGREEMENTS</b>					
<b>Hotel, Catering, and other Agreements</b>	See requirements for "Goods or Services" above	Signed by SOG Services Director	Signed by Foundation Director		
<b>TRAVEL</b>					
<b>Travel</b>	•Travel Request prior to travel for over night travels through Concur •Direct travel expenses paid for with T&E card •Expense Report through Concur, including per diem and mileage reimbursement	•Documented Travel Approval from Supervisor •Direct travel expenses paid for with Ramp Credit Card •Per diem and mileage reimbursement issued through Concur, travel request needed for overnight travel	•Documented Travel Approval from Supervisor •Direct travel expenses paid for with Civic Credit Union Credit Card •Per diem and mileage reimbursement issued through Concur, travel request needed for overnight travel		