

Purchasing Requirements for SOG Businesses

UNC SOG		SOG Services	SOG Foundation
CREDIT CARDS			
Credit Card	P-card (Provide receipt, chartfield string in BOA Works) T&E Card for business meals and professional dues (Provide receipt, chartfield string in Concur)	P-card (Provide receipt, chartfield string in BOA Works) Ramp Card (Provide Receipt, memo, and Cost Code in Ramp)	Pcard (Provide receipt, chartfield string in BOA Works) or SOG Foundation Ramp Card (Provide receipt, memo, and cost code in Ramp) - Leadership/Advancement Team Only
INDEPENDENT CONTRACTORS			
One-week speaker less than \$5,000	<ul style="list-style-type: none"> • Speaker Checklist • Vendor Registration through Payment Works 	<ul style="list-style-type: none"> • SOG Services Speaker Checklist • W-9 	<ul style="list-style-type: none"> • Speaker Checklist • Vendor Registration through Payment Works
Community collaborator less than \$5,000	<ul style="list-style-type: none"> • Collaborator Checklist • Vendor Registration through Payment Works 	<ul style="list-style-type: none"> • SOG Services Collaborator Checklist • W-9 	<ul style="list-style-type: none"> • Collaborator Checklist • Vendor Registration through Payment Works
IC less than \$10,000	<ul style="list-style-type: none"> • Employee/Independent Contractor Determination Checklist • Vendor Registration through Payment Works • Background check if working with students, more than one engagement in a year, or access to data • Data Protection Checklist if working with data. Data Governance Review if working with sensitive data. 	<ul style="list-style-type: none"> • SOG Services Contracted Service Authorization and Approval Form • W-9 • Scope of Work 	<ul style="list-style-type: none"> • Employee/Independent Contractor Determination Checklist • Vendor Registration through Payment Works • Background check if working with students, more than one engagement in a year, or access to data • Data Protection Checklist if working with data. Data Governance Review if working with sensitive data.
IC greater than \$10,000	<ul style="list-style-type: none"> • Employee/Independent Contractor Determination Checklist • Vendor Registration in PaymentWorks • Waiver of Competition • Independent Contractor Service Agreement • Statement of Work • Background check if working with students, more than one engagement in a year, or access to data • Data Protection Checklist if working with data. Data Governance Review if working with sensitive data. 	<ul style="list-style-type: none"> • SOG Services Contracted Service Authorization and Approval Form • W-9 • Independent Contractor Services Agreement • Scope of Work 	<ul style="list-style-type: none"> • Employee/Independent Contractor Determination Checklist • Vendor Registration in PaymentWorks • Waiver of Competition • Independent Contractor Service Agreement • Statement of Work • Background check if working with students, more than one engagement in a year, or access to data • Data Protection Checklist if working with data. Data Governance Review if working with sensitive data.

GOODS AND SERVICES			
Goods or Services Less than \$5,000	<ul style="list-style-type: none"> • Invoice • Vendor Registration in PaymentWorks 	<ul style="list-style-type: none"> • Invoice • W-9 	<ul style="list-style-type: none"> • Invoice • W-9 • Approval from Foundation Treasurer >\$2,500
Goods or Services between \$5,000 and \$25,000	<ul style="list-style-type: none"> • Quote (Recommended: obtain pricing from multiple sources) • Requisition and Purchase Order (PO) • Vendor Registration in PaymentWorks 	<ul style="list-style-type: none"> • Invoice • W-9 • Quote approved by Assistant Dean for Business & Finance, Assistant Dean for Programs, or SOG Services Director • If agreement is required by vendor, agreement signed by SOG Services Director 	<ul style="list-style-type: none"> • Invoice • W-9 • Quote approved by Foundation Treasurer or Dean • If agreement is required by vendor, agreement is signed by Foundation Treasurer or Dean
Goods or Services between \$25,000 and \$100,000	<ul style="list-style-type: none"> • 3 quotes through official University RFQ prepared by Purchasing Services or Waiver of Competition form • Requisition and Purchase Order (PO) • Vendor Registration in PaymentWorks 	<ul style="list-style-type: none"> • Invoice • W-9 • Quote approved by Assistant Dean for Business & Finance, Assistant Dean for Programs, or SOG Services Director • If agreement is required by vendor, agreement signed by SOG Services Director • Statement of Work 	<ul style="list-style-type: none"> • Invoice • W-9 • Quote approved by Foundation Treasurer or Dean • If agreement is required by vendor, agreement is signed by Foundation Treasurer or Dean • Statement of Work
Goods or Services exceeding \$100,000	<ul style="list-style-type: none"> • 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 Registration in PaymentWorks • Detailed Evaluation criteria 	<ul style="list-style-type: none"> • Invoice • W-9 • Quote approved by Assistant Dean for Business & Finance, Assistant Dean for Programs, or SOG Services Director • If agreement is required by vendor, agreement signed by SOG Services Director • Statement of Work 	<ul style="list-style-type: none"> • Invoice • W-9 • Quote approved by Foundation Treasurer or Dean • If agreement is required by vendor, agreement is signed by Foundation Treasurer or Dean • Statement of Work
HOTEL AND CATERING AGREEMENTS			
Hotel, Catering, and other Agreements	See requirements for "Goods or Services" above	Signed by Assistant Dean for Business and Finance (under \$10,000) or SOG Services Director (over \$10,000)	Signed by Assistant Dean for Business and Finance (under \$10,000) or Senior Associate Dean for Administration (over \$10,000) or Dean (over \$100,000)
TRAVEL			
Travel	<ul style="list-style-type: none"> • Travel Request prior to travel for over night travel through Concur • Direct travel expenses paid for with T&E card • Expense Report through Concur, including per diem and mileage reimbursement 	<ul style="list-style-type: none"> • Documented Travel Approval from Supervisor • Direct travel expenses paid for with Ramp Credit Card • Per diem and mileage reimbursement issued through SOG Business Office - use expense form 	<ul style="list-style-type: none"> • Documented Travel Approval from Supervisor • Direct travel expenses paid for with Ramp Credit Card • Per diem and mileage reimbursement issued through SOG Business Office - use expense form

Helpful Links

Vendor Forms & Registration:

[UNC Vendor Registration System \(Paymentworks\)](#)

[UNC Guidelines for vendor registration](#)

[UNC tax exemption letter](#)

[UNC Waiver of Competition](#)

[UNC Data Protection Checklist](#)

Independent Contractors:

[SOG Affiliate Matrix](#)

[UNC Independent Contractor Determination Form](#)

[UNC Independent Contractor Services Agreement form](#)

[UNC Data Protection Checklist \(for ICs with access to data\)](#)

[SOG Services IC Request Form and Checklist](#)

[SOG Services One-Day Speaker Checklist up to \\$5000](#)

Travel:

[Travel & Expense Card vs Pcard](#)

[Travel Allowances, Mileage and Per diem rates](#)

[SOGS Travel Policy.pdf](#)

[SOGS Travel Expense Form](#)

[Non-Hotel Lodging Authorization Request Form](#)

Credit Cards:

[Credit Cards at SOG](#)

[Travel & Expense Card vs Pcard](#)

[Missing Receipt Affidavit](#)