

California State Polytechnic University, Pomona
Procurement Services
PROCUREMENT METHODS

This matrix tool is intended to determine the most appropriate process to purchase goods or services.

TRANSACTION TYPE	REQUISITION	DIRECT PAY	P-CARD Adherence to the P-Card Policy is required. Refer to the P-Card Program Policy Manual before determining a P-Card purchase.	PROHIBITED USE
Advertisements (Permissible followed by the Direct Pay Form)	X	X		
Alcoholic Beverages, Ammunitions, Chemicals/Hazardous Materials, Controlled Substances, Firearms, Narcotics (Permissible <i>only</i> after approved by EH&S and Procurement Services)	X			X
Blanket Purchase Orders / Open Orders	X			
Computers (Requires an ATI/IT Review)				
<ul style="list-style-type: none"> • <i>Touchpads, notebooks, desktops, laptops, servers, etc. valued under \$5,000 (unit price inclusive of sales tax)</i> 			X With written authorization from procurement services	
<ul style="list-style-type: none"> • <i>Touchpads, notebooks, desktops, laptops, servers, etc. valued \$5,000 and over (unit price inclusive of sales tax)</i> 	X			
Consulting Services	X			
Contracts				
<ul style="list-style-type: none"> • <i>Agreements authorized to pay via P-Card (Requires Q#)</i> 			X	
<ul style="list-style-type: none"> • <i>Licenses/Maintenance/Service/Renewal Contracts (i.e., Copiers, Software License Renewals)</i> 	X			
<ul style="list-style-type: none"> • <i>Formal Agreements (Contracts Request Form Required and submit to procurement@cpp.edu)</i> 				

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Equipment (All IT related equipment requires a completed ATI/IT review)				
<ul style="list-style-type: none"> Equipment valued under \$5,000 (Equipment purchase on p-card must follow the additional consideration in the P-Card Policy Manual for asset tagging) 	X		X	
<ul style="list-style-type: none"> Equipment valued at \$5,000 and over (unit price inclusive of sales tax), with or without installation. Asset Management Office must be notified of purchase to update campus property inventory records. 	X			
<ul style="list-style-type: none"> Equipment valued at \$15,000 and over 	X			
<ul style="list-style-type: none"> Instructional Equipment valued at \$5,000 or more (unit price inclusive of applicable tax, freight, delivery, installation, etc.). The Asset Management Office will record in the campus property inventory records. 	X			
Fees				
<ul style="list-style-type: none"> Accreditation fees and expenses: lodging, meals, transportation, expenses required by accreditation 		X	X	
<ul style="list-style-type: none"> Submission fees: publishing papers in academic journals/publications 		X		
Film and video rentals			X	
Furniture				
<ul style="list-style-type: none"> All orders greater than \$1,000 (total cost of order) that includes assembly, disassembly, and installation services. 	X			
<ul style="list-style-type: none"> All orders \$1,000 and under (total cost of order) that includes assembly, disassembly, and installation services. (Requires Q#) 			X	
Gifts or items of a personal nature / Purchases for personal use				X
Hospitality				

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Meals / Refreshments				
<ul style="list-style-type: none"> Catering services / on-campus delivery 		X		
<ul style="list-style-type: none"> Room block agreements 	X			
<ul style="list-style-type: none"> Curbside delivery or pick-up 		X		
Memberships (no personal reimbursements)		X	X	
Public Works / Facilities Planning	X			
Registrations Fee (use of the Corporate Travel Card. Refer to the University Corporate Travel Card Program)				
Services				
<ul style="list-style-type: none"> Services by Auxiliary Services Corporation (e.g., food services, space rental, etc.) 	X	X		
<ul style="list-style-type: none"> Services of any nature performed on or off campus (i.e., installations, printing and shredding services, equipment repairs, etc.) *Q Number required for P-Card. 	X		X*	
Speakers (With 30 Days Notice / Prior to coming on to Campus & Cost >\$5K) (Guests, Special Lecturers, Honorariums, non-CPP personnel for on-campus events)				
<ul style="list-style-type: none"> Payments for non-CPP personnel for on-campus events 	X			
<ul style="list-style-type: none"> Payments to Speakers doing business as a company 	X			
Software (Requires a completed ATI/IT Review)				
<ul style="list-style-type: none"> All software, licenses, and subscriptions 	X		X With written authorization from procurement services	
<ul style="list-style-type: none"> All software leases, licenses, renewals, maintenance and support and library subscriptions/ periodicals paid in advance of Fiscal Years (prepaids) 	X			
Subscriptions (magazines only)		X	X	
Travel (Accounts Payable & Travel Website)				