UNIVERSITY OF ILLINOIS REQUIREMENTS

Steps to make a purchase:

- Purchased via a PO
  - A quote is needed and must be dated within 30 days. It can be in email, a price sheet, or official quote.
  - Once the PO number is received, the item can be ordered or service can start

If faculty purchased and need reimbursement you must determine if their reimbursement is allowable. (see document below)

How to make purchases if they cannot be purchased with a Pcard and they require a PO:

- “Any procurement of services requires a purchase order (PO) to be in place BEFORE any work commences. It can take a more than a month to work with the various university departments that need to review and approve a PO. Please be sure to contact your department’s office support with ample time to complete the request for PO. Two months is recommended.”

This includes:
  - using an editor or proofreader for manuscripts or other scholarly works
  - purchasing any type of service or product that requires a signature or agreement of terms
  - paying an “honorarium” to a person if they want the funds paid to their corporation and not to them as an individual
  - paying for a performer of any type
  - paying for a photographer

- What information is needed to request a PO
  - Vendor name – office staff will check if vendor is in Banner, if vendor is not (or information is outdated) they will need to fill out a vendor information form before the PO can be requested
  - Quote from within the past 30 days- This can be a price sheet, email, official quote. Please make sure the quote does not reference the word “invoice.”
What can employees purchase for reimbursement (beyond travel expenses and business meals):

- **Membership to Professional Organizations** - Employee memberships in professional organizations are allowable when the memberships benefit system business purposes and/or the employee's job-related activities. Memberships are normally paid on a yearly basis. Memberships that exceed three years must be approved as an exception.
- **General office supplies**
- **Books for research purposes**
- **Subscriptions to journals (yearly basis)**
- **Ask your office support or LAS Service Center if you have something else in mind, and we can confirm before you are out non-reimbursable funds!**

What cannot be purchased for reimbursement:

- **Any services (editing, indexing, photography, or use of photography, etc.)**
- **Any purchase that requires a signature/agreement to terms or conditions**
  - This includes online services that you pay subscriptions for
- **Honoraria (these need to be paid directly to the individual to be paid)**
- **Items from Amazon, Sam’s, Costco, or any store you must join with a membership**
- **Software, Online Electronic Services (anything you sign into over the internet).**
- **Items that will be given to students as gifts**
- **For anything that is Prohibited & Restricted on P-Card Purchases**
- **Tax**
- **Items that do not have itemized receipt**
- **For any item the university has a current contract. It is best to ask LAS service center if unsure.**
  - “These partnerships cover a variety of suppliers and the corresponding goods and services required for the daily operation of a large University of Illinois System, encompassing Procurement Contracts Search, Campus Stores, and Diversity Suppliers as well as a number of individual suppliers that provide beneficial agreements for a unique or specific campus need.” **Suppliers**
  - Strategic Contracts and Awards

What are honoraria for:

- **Token of gratitude for activities for which custom or propriety precludes a price to be set.**
  - **Examples:** A minister or cleric providing an invocation; a distinguished alumnus invited to make brief remarks at the dedication of a new university facility; an individual participating as a judge in a contest; or a Supreme Court Justice invited to judge a moot court competition.
Award to an individual for special achievement, or renown for participation in (excluding leading or conducting) a short-term activity or event that is of an educational, research, or public service nature and no specific deliverable or specific result is requested or expected.

- **Examples:** Guest lecturers; reading of papers; participating in workshops and seminars; presenting research results, an address, or a speech; or an invited noted international scholar participating in a scientific symposium

**How to issue Honoraria:**

- Vendor will need to be in the Banner system before payment. Please talk to office support or LAS service center on how to get this paperwork started
- Not allowable to University of Illinois System employees or students
- Only to individuals, not to a business entity. Payment to business entity needs a purchase order.
- Honoraria/reimbursements to Foreign Nationals cannot be paid to visitors on certain visas.
  - Special paperwork is needed to issue honoraria/reimbursements to foreign national visitors who can receive payments.
- If a deliverable is expected, then no Honoria can be issued