

California State University, Fullerton
Contracts and Procurement
PROCUREMENT METHODS

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

TRANSACTION TYPE	REQUISITION (add description)	CHECK REQUEST	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	X	X		
Alcoholic Beverages, Ammunitions, Chemicals/Hazardous Materials, Controlled Substances, Firearms, Narcotics	X			X
Blanket Purchase Orders / Open Orders	X			
Computers (Requires IT Authorization Number)				
<ul style="list-style-type: none"> • <i>Touchpads, notebooks, desktops, laptops, servers, etc. valued under \$5,000 (unit price inclusive of sales tax) See instructional equipment.</i> 			X	
<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 related to P-Card purchases (Requires Q#)</i> 			X	
<ul style="list-style-type: none"> • <i>Licenses/Maintenance/Service/Renewal Contracts (i.e., Copiers, Software License Renewals)</i> 	X			
Contracts				
<ul style="list-style-type: none"> • <i>Formal Agreements (Contracts Request Form Required)</i> 				
Equipment (All IT related equipment requires IT Authorization Number)				

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<ul style="list-style-type: none"> Equipment valued under \$5,000 	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	X	
Film and video rentals				
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. (Q# Required) 			X	
Gifts or items of a personal nature / Purchases for personal use				
Gift cards (requires pre-approval & supporting documentation)				
Hospitality				
Meals / Refreshments (Refer to Pre-approved Caterers List)				

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<ul style="list-style-type: none"> Catering services / on-campus delivery (Q# Required) 			X	
<ul style="list-style-type: none"> Room block agreements 			X	
Meals / Refreshments				
<ul style="list-style-type: none"> Curbside delivery or pick-up 			X	
Memberships (no personal reimbursements)		X	X	
Public Works / Facilities Planning	X			
Registrations			X	
Services				
<ul style="list-style-type: none"> Services by Auxiliary Services Corporation (e.g., food services, space rental, etc.) 			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.) 	X		X	
Speakers (Guests, Special Lecturers, Honorariums, non-CSUF personnel for on-campus events)				
<ul style="list-style-type: none"> Payments for non-CSUF personnel for on-campus events 	X			
<ul style="list-style-type: none"> Payments to Speakers doing business as a company 	X			
Software (Requires IT Authorization Number)				
<ul style="list-style-type: none"> All software, licenses and subscriptions. 	X		X	
<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)				