

Procurement 101

Everything you need to know to successfully make a purchase at Carolina.



When is a PO required?

- For goods and services costing in excess of \$5,000 from a vendor
 - Excludes, services from an individual. This is an Independent Contractor.
- For services where there is a legal contract (with terms and conditions).
 - Excludes agreements over what types of food will be served at an event or where the event will be due to inclement weather
- Advance payments
 - Deposits
- For goods and services costing less than \$5,000 from a vendor
 - Software Licenses
 - Vehicle Tags and Title Fee
 - Radioisotopes (if ordered from a non-ePro vendor)

Types of Payments That Do Not Require a PO

- Goods and services costing less than \$5,000 from a vendor –
Note: ePro should be used if item is available from a vendor on the ePro platform. State term-contracts should always be checked prior to purchasing any goods or services costing less than \$5,000.
<https://ncadmin.nc.gov/statewid-e-term-contracts>
 - Exceptions:
 - Software Licenses
 - Vehicle Tags and Title Fee
 - Radioisotopes (if ordered from a non-ePro vendor)
- Accreditation Fees
- Advertising
- Awards/Fellowships to Students or Employees
- Bank Fees
- Cash Advances
- Cable Fees
- Court Judgements
- Employee Education
- Governmental Agency Payments, including the UNC Health Care System
- Honorariums
- Independent Contractor Payments
- Insurance
- Legal Settlements
- License Fees (other than software)
- Membership Dues
- Payments to units within UNC at Chapel Hill
 - Rizzo Center, Carolina Inn, Friday Center, Carolina Club
- Petty Cash
- Postage and Postage Meter replenishment
- Refunds
 - Examples: Dental patients, Athletic tickets, etc.
- Reimbursements
- Rent Payments
- Royalties
- Stipends
- Study Subjects
- Subscription Renewals
- Taxes
- Tuition to another University
- Utilities