

Procure to Pay Guidelines

Contracts and Purchasing Services have [Procurement Pathways](#) for obtaining products and services for your department. The following is a list of items that have purchase restrictions, are restricted to a specific pathway, or are prohibited all together. If you have any questions, please contact Finance at financeconnect@sjsu.edu or 408-924-1558.

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
Ad Services (publication or online)	Yes, if: <ul style="list-style-type: none"> Purchase is \$1,500 or less. When no agreement/contract is required. 	No	No	Yes, if: <ul style="list-style-type: none"> Purchase is \$1,500 or less. When no agreement/contract is required. 	No	No	Yes
All Services	Yes, if: <ul style="list-style-type: none"> Service providers are SJSU's strategic partners Iron Mountain for document shredding and bottled water service from Nestle Waters. Automobile repair services, not including parts, allowed for UPD and FD&O. 	No	No	Yes, if: <ul style="list-style-type: none"> When no agreement/contract is required. Refer to the Direct Payment Products and Services for list of specific services. 	No	No	Yes

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
Anything requiring an SJSU signature on a contract, including deposits for off-campus events	No	No	No	No	No	No	Yes
Cash Advances	No	No	No	No	No	No	No
Chemicals	<ul style="list-style-type: none"> • Yes • If hazardous an MSDS is obtained with goods. 	<ul style="list-style-type: none"> • Yes • If hazardous an MSDS is obtained with goods. 	No	No	No	No	Yes
Copy Machines ¹	No	No	No	No	No	No	No
Customization orders/products with or without logo²	No	No	No	No	No	No	Yes
Engraving	No	No	No	No	No	No	Yes

¹ Copy machines or office copiers are covered under the Campus Copier Program. Contact Campus Copier Coordinator Emely Balingit, at emely.balingit@sjsu.edu or 408-924-1767

² Customized rubber stamps require University Advancement's approval.

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
Equipment, includes computers, computer monitors, and peripherals³	Yes, if: <ul style="list-style-type: none"> Employee use only. \$5,000 purchase limit on unit or parts for a billing cycle. Up to three computers (including tablets) or computer monitors can be purchased in a billing cycle. Cannot be related to Accessible Technology Initiative (ATI)⁴. Except for Apple Care or Dell's service warranty, item cannot involve a maintenance or service contract Item cannot have any terms and conditions attached. 	<ul style="list-style-type: none"> Yes, with ProCard. 	No	No	No	No	Yes

³ Refers to whole unit and/or parts to create or run a unit; includes computers and tablets. Equipment may need [FD & O](#) review and written approval before requesting department submits a Requisition. Refer to [FF&E Permit Requirements](#) for guidelines.

⁴ ATI review is required in order to ensure Section 508 compliance.

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
Fans, heaters, and air conditioners ⁵	No	No	No	No	No	No	Yes
Food/Catering ⁶	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines and Catering Policy. 	No	No	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines and Catering Policy. 	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines and Catering Policy. 	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines and Catering Policy. 	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines and Catering Policy.
Furniture ⁷	No	No	No	No	No	No	Yes
Gifts (e.g., flowers, cards) ⁸	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines. 	No	No	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines. 	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines. 	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines. 	<ul style="list-style-type: none"> Yes, must comply with Hospitality Guidelines.
Household Appliances ⁹	No	No	No	No	No	No	Yes
Insurance ¹⁰	No	No	No	No	No	No	No
Maintenance	No	No	No	No	No	No	Yes

⁵ Product requires FD & O review and written approval before requesting department submits a Requisition. FD & O approval needed even if new appliance is replacing a non-functioning one.

⁶ A completed [Hospitality Expense Justification](#) form must be included with support backup documentation for all payment or purchase requests.

⁷ Furniture may need FD & O review and written approval before requesting department submits a Requisition. Refer to FD& O [FF&E Permit Requirements](#) for guidelines.

⁸ A completed [Hospitality Expense Justification](#) form must be included with support backup documentation for all payment or purchase requests.

⁹ Products require [FD & O](#) review and written approval before requesting department submits Requisition.

¹⁰ Contact [Risk Management](#) for more information regarding risk policies.

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
Memberships (Professional or organizational)	Yes	No	<ul style="list-style-type: none"> Yes, if paid in conjunction with event registration or fees. 	Yes	Yes	No	Yes
Ingestible Medication	No	No	No	No	No	No	Yes
Plaques and Awards	No	No	No	No	No	No	Yes
Postage ¹¹	<ul style="list-style-type: none"> Yes, if UPS CampusShip. 	No	No	No	No	No	No
Printing or other related services	<ul style="list-style-type: none"> Yes, if SJSU official business stationery and business cards from strategic partner Medius Corp. 	No	No	No	No	No	Yes
Products for personal use	No	No	No	No	No	No	No

¹¹ Contact [Distribution Services](#) for assistance with mail and delivery services.

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
Public Works or Trade Work	No	No	No	No	No	No	Yes
Real property, purchases, leases, or rentals	No	No	No	No	No	No	Yes
Software	No	No	No	No	No	No	Yes, software will require ATI ¹² review
Subscriptions	<ul style="list-style-type: none"> Yes, for view only subscriptions such as to a newspaper, online journal, or professional publication. Cannot be software related. 	No	No	<ul style="list-style-type: none"> Yes, for view only subscriptions such as to a newspaper, online journal, or professional publication. Cannot be software related. 	<ul style="list-style-type: none"> Yes, for view only subscriptions such as to a newspaper, online journal, or professional publication. Cannot be software related. 	<ul style="list-style-type: none"> Yes, for view only subscriptions such as to a newspaper, online journal, or professional publication. Cannot be software related. 	Yes
Telephones ¹³	No	No	No	No	No	No	No

¹² ATI review is required in order to ensure Section 508 compliance.

¹³ Contact [ITS Unified Communication Services](#) for campus telephone services and equipment.

Commodity	ProCard	Campus Marketplace	GoCard	Direct Payment	Employee/Student Reimbursement	Petty Cash	Requisition
<i>Travel Expenses</i> ¹⁴	No	No	<ul style="list-style-type: none"> Yes, refer to the GoCard Program for approved expenses. 	No	No, submit a Travel Reimbursement instead.	No	No
<i>Wireless/Cellular Devices</i>	<ul style="list-style-type: none"> Yes, must comply with the Wireless Device Program. 	No	No	<ul style="list-style-type: none"> Yes, must comply with the Wireless Device Program. 	<ul style="list-style-type: none"> Yes, must comply with the Wireless Device Program. 	No	<ul style="list-style-type: none"> Yes, must comply with the Wireless Device Program.

References

Accessible Technology Initiative (ATI)- http://www.sjsu.edu/finance/policies_guidelines/ati/ati_criteria/index.html

Catering Policy- http://www.sjsu.edu/finance/policies_guidelines/catering/index.html

Direct Payment Products and Services- http://www.sjsu.edu/finance/financeconnect/resources/pathways/direct_pay/dp_checklist/

Fixture, Furniture, and Equipment (FF&E) Permit Requirements- <http://www.sjsu.edu/fdo/services/>

GoCard Program- <http://www.sjsu.edu/finance/financeconnect/resources/pathways/gocard/index.html>

Hospitality Guidelines- http://www.sjsu.edu/finance/policies_guidelines/hospitality/index.html

ProCard Program- <http://www.sjsu.edu/finance/financeconnect/resources/pathways/procard/index.html>

Procurement Pathways- <http://www.sjsu.edu/finance/financeconnect/resources/pathways/index.html>

SJSU Business Stationery (Medius Corp.)- <http://www.sjsu.edu/communications/identity/powersource/stationery/>

¹⁴ [Travel Expense Reimbursements](#) are processed through Financial Transaction Services, with some exception for Foreign Faculty, Students, and Volunteers. For detailed information, please contact the [Accounts Payable Travel Specialist](#).

Strategic Partners- http://www.sjsu.edu/finance/about_us/purchasing/strategic_partners/index.html

Travel Reimbursement- http://www.sjsu.edu/finance/about_us/ap/travel/index.html

Wireless Device Program- http://www.sjsu.edu/finance/policies_guidelines/wireless_device_policy/index.html

Departments

Accounts Payable- http://www.sjsu.edu/finance/directory/directory_bydept/ap_directory/index.html

Contracts and Purchasing Services- http://www.sjsu.edu/finance/about_us/purchasing/index.html

Distribution Services- http://www.sjsu.edu/finance/directory/directory_bydept/distribution_svcs_directory/index.html

FD & O- <http://www.sjsu.edu/fdo>

ITS Unified Communication Services- <http://its.sjsu.edu/about/organization/unified-communications/>

Risk Management- http://www.sjsu.edu/finance/about_us/risk_mgmt/