

OU AP&P 1000 - Exhibit 1
Goods and Services with Special Procurement Requirements
Last Updated: January 22, 2026

Type of Purchase	Requirements	PURCHASE METHOD			PAYMENT METHOD		Special Approval Required	Required Policy
		SERVICE AGREEMENT	PO	P-Card PV	PV	P-Card		
Beverages								
Alcohol - University Sponsored Event	University sponsored events where alcohol will be served must have pre-approval from the President's Office or have an approved Exception to Policy. (See OU AP&P 400 Alcohol for specifics) Alcohol may not be charged to the general fund.	N/A	RQD	N/A	YES	YES	President	400
Alcohol - Hosting	Vice Presidents must approve reimbursement/payment for any hosting expense that includes alcohol. Itemized receipt is required for reimbursement. Alcohol may not be charged to the general fund even for approved events. Cardholders must be sure to do a split allocation for any payment receipt that contains alcohol.	N/A	>\$10K	\$10K or <	YES	YES	Executive Officer	208
Non-Alcoholic	The University has an exclusive pouring rights agreement with PepsiCo. All non-alcoholic brands in a beverage-type sold by PepsiCo must be purchased through the exclusive PepsiCo agreement. The list of non-alcoholic brands can be found on the Purchasing website under Preferred Suppliers.	NA	NA	NA	YES	YES		
Awards & Gift Recognition	Cash, gift cards and gift certificates to employees are not allowed. Executive Officers may recognize employees and students with a token of appreciation for extraordinary work with non-cash awards, prizes or gifts valued under \$75 (e.g., OU sweatshirt). Monetary awards for student academic achievement may be allowable and must be documented and reported to the Financial Aid Office.	N/A	>\$10K	\$10K or <	YES	YES	Executive Officer	207
Banking and Financing	Banking, financing or credit obligations must be reviewed by Treasury Management and contracts reviewed by OLA.	N/A	RQD	N/A	YES	YES	Treasury Management	1000
Buses and Other Rented Transportation	All transportation should be booked through the preferred suppliers. If a preferred supplier cannot be used, contact Purchasing and Risk Management for approval.	N/A	>\$10K	\$10K or <	YES	YES	Risk Management	1050
Catering								
Independent Restaurants & Caterers	When arranging food at University events purchased from restaurants having only one location or caterers, staff must utilize preferred suppliers listed on the Purchasing website. If a preferred supplier is not available then contact Purchasing and Risk Management prior to the event.	N/A	>\$10K	\$10K or <	YES	YES	Purchasing	1000
Chain Restaurants	Food at University events purchased from chain restaurants (restaurants having multiple locations) does not require insurance.	N/A	>\$10K	\$10K or <	YES	YES		1000

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Communications for external audiences	Communications per policy 488 will be purchased by Communications and Marketing or approved for purchase by them, prior to department making any purchase.	N/A	>\$10K	\$10K or <	YES	YES	UCM	488
Construction and Building Renovations	All building repairs, upgrades, alterations, and renovations, including plans, must be approved by Facilities Management, regardless of the funding source or work force.	N/A	>\$10K	\$10K or <	YES	YES	Facilities Management	310
Contracts								
OU Services Agreement	OU Service Agreements are required for arrangements between OU and all performers, consultants, independent contractors and others providing professional services to the University at \$10K and below. If greater than \$10K consult with buyer. Proof of adequate insurance is required from anyone providing services on campus (unless exempted by Risk Mgt). The OU Services Agreement may be used for these types of arrangements as long as the OU Terms and Conditions are not altered. See the OU Services Agreement and the Instruction Sheet on the OLA website. Purchasing must sign all service agreements. For individuals and LLCs an I/C Checklist will be required to determine whether a person is an Employee or an Independent Contractor. See the Independent Contractors section below.	<\$10K	>\$10K	NO	YES	YES	OLA, if OU Terms and Conditions are altered	262, 410
All Other Contracts	For all other contracts, agreements, licensing and royalty arrangements, follow any applicable Purchasing policy. Purchasing will process with OLA and Purchasing must sign these contracts on behalf of OU. See Contracting Authority in the Definitions section of this policy.	N/A	>\$10K	\$10K or <	YES	YES	OLA	410
Controlled Substances	All controlled substances must be purchased by a University physician or veterinarian.	N/A	RQD	N/A	YES	YES		640
Employment Advertising								
Faculty	After completing all steps required by OU AP&P 750, Academic units place their own ads for faculty employment.	N/A	N/A	N/A	YES	YES	Human Resources	750
Non-Faculty	All ads for non-faculty employment are purchased by University Human Resources.	N/A	N/A	N/A	YES	YES	Human Resources	725, 770

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Employee Entertainment Activities	Employee parties, showers, birthday outings etc. are personal expenses, however an Executive Officer may approve an entertainment event as defined in OU AP&P 207. For approved events, payment documentation must include a statement of the business rational for the event, a list of the attendees or type of attendees and original, itemized receipts. Such activities should be paid with non-general funds.	N/A	>\$10K	\$10K or <	YES	YES	Executive Officer	207
Firearms	Only the OUPD may purchase firearms.	N/A	RQD	N/A	YES	YES		1000
Fire Safety Equipment	All fire safety equipment purchases must be reviewed and approved by Environmental Health and Safety.	N/A	>\$10K	\$10K or <	YES	YES	Environmental Health & Safety	675
Flowers and Plants								
Events	Flowers and plants for campus-wide events or University sponsored recognition programs may be purchased by the funding department or Executive Events. You may not purchase flowers for an individual. (See Tributes section)	N/A	>\$10K	\$10K or <	YES	YES		1000
Landscaping	Flowers and plants for campus grounds and buildings may only be purchased by Facilities Management, the Golf and Learning Center and Meadow Brook Hall.	N/A	>\$10K	\$10K or <	YES	YES		1000
Tributes	All floral tributes for death or illness of a staff member (or staff's family member) are requested through UHR or AHR and handled by the President's Office per OU AP&P 455.	N/A	>\$10K	\$10K or <	YES	YES	President's Office	455, 207
Freight, Shipping and Overnight Mail Charges	Freight and shipping charges can be added to PO's (not blankets) beyond the stated total by up to 15% of the total (max \$1,000) without a change order. Courier services may be paid on the P-Card. Add an explanation on the PV for any overages.	N/A	N/A	N/A	YES	YES		1000
Foreign Payees								
US Source Income	If a foreign person or company comes to the US to provide goods or services, special paperwork is required to pay them. Individuals must come in under the correct visa type to be paid. 30% withholding applies for all payees that do not have a US tax ID or do not have a federal treaty exemption. Before contract is signed or work begins, contact Tax Compliance.	N/A	>\$10K	\$10K or <	YES	YES for companies	Tax Compliance	1000
Foreign Source Income	Payment to a foreign person or organization that takes place outside of the US must be documented as foreign source by the department and requires special paperwork. Contact Tax Compliance regarding all payments to foreign persons or companies before making the purchase.	N/A	>\$10K	\$10K or <	YES	YES for companies	Tax Compliance	1000

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Gift Cards	The purchase of gift cards and gift certificates for OU employees or students is not allowed. Questions about gift cards should be addressed to the Accounts Payable Manager. Gift cards are only allowable with an IRB Approved research study. Follow Research Participant Disbursement Procedure.	N/A	N/A	YES	N/A	N/A	Accounts Payable	207
Grant Expenditures	All grant expenditures must be approved by Grants, Contracts and Sponsored Research prior to purchase regardless of purchase method. Submit your grants approval with payment request.	N/A	>\$10K	\$10K or <	YES	YES	Research Office	500
Honoraria	Complete the "Employee vs. Independent Contractor Classification Checklist" per OU AP&P 262 before the visitor arrives to receive a determination on whether your speaker can be paid thru the honoraria process. If Accounting determines that the payment will be an honoraria, attach the Honoraria Form and event flyer to a PV to process payment. If your speaker charges a fee, Independent Contractor payment procedures must be followed (see below). Honoraria are normally no more than \$1,000.	N/A	N/A	N/A	YES	NO	Accounting	262
Hosting	See payment section of OU AP&P 208 for hosting payment requirements. Include business purpose, date of event, list of attendees and university affiliation on all payment documentation. Events with 20 attendees or more must be paid by PO. See alcoholic beverages above.	N/A	>\$10K	\$10K or <	YES	YES		208
Human Participants in Internal Review Board Approved Studies	Researchers making incentive payments to human study participants must have the IRB application and must follow Research Participant Disbursement Procedure.	N/A	NO	YES	YES	YES	Research Office	
Independent Contractors	The IRS considers most individuals receiving compensation from the University to be employees and requires that they be paid through Payroll. To determine if a person falls under IC status, complete the "Employee vs. Independent Contractor Classification Checklist" per OU AP&P 262 and submit to Accounting for a determination before the person starts work. IC's working on campus must provide certificate of insurance (unless exempted by Risk Management) and be paid through a PO or have an OU Standard Services agreement in force before work begins. The checklist, agreement and certificate of insurance must be submitted with the PV for payment to be processed.	<\$10K	>\$10K	\$10K or <	YES	YES	Tax Compliance	262

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Information Technology								
Software, License Agreements	Software purchases are contracts that require special reviews and approvals. No software purchases can be made on a P-Card without UTS review and approval. Please review the UTS Campus Software Procedures (www.oakland.edu/UTS/software) to determine the correct procedure for software purchases. The University does not reimburse software purchases.	N/A	RQD	N/A	YES	YES	UTS, OLA	870
Hosting, outsourcing, application service provider products, subscription agreements, etc	Hosting, outsourcing, application service provider products, subscription agreements, etc must be approved by UTS before the purchase is finalized or contracts are signed. The P-Card cannot be used to purchase hosting, outsourcing or application service provider services but can be used for payment.	N/A	RQD	N/A	YES	YES	UTS, OLA	870
Insurance								
University Insurance	All University insurance is purchased through Risk Management.	N/A	N/A	N/A	YES	YES	Risk Management	1050
Trip Cancellation	Trip cancellation coverage may be purchased in conjunction with travel arrangements at the department's discretion.	N/A	NO	YES	YES	YES		1200
Laboratory Animals	Laboratory animals may only be purchased through Biomedical Research Support Facility.	N/A	>\$10K	\$10K or <	YES	YES	Environmental Health & Safety	615
Large Equipment Supported by Utilities	All large equipment supported by utilities must be reviewed by Facilities Management.	N/A	>\$10K	\$10K or <	YES	YES	Facilities Management	1000
Leases/Rental Agreements	All lease or rental agreements must be purchased on a PO. Rental agreements must be reviewed by OLA.	N/A	RQD	N/A	YES	YES	OLA	1000
Legal Services	All legal services will be purchased by OLA.	N/A	N/A	YES	YES	YES	OLA	1000
Mailings	All mailings should follow policy 1340 and mailservices does have a reduced rate on mail pieces compared to purchasing stamps. All mail should be sent through mail services to take advantage of this discount.	N/A	N/A	N/A	N/A	N/A	Mailroom	1340

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Memberships and Subscriptions to Professional Organizations	Institutional memberships in professional organizations are maintained by the University through it's divisions. Personal memberships in professional organization and subscriptions to professional publications may be paid with University Funds only when an institutional membership or subscription is not available.	N/A	NO	YES	YES	YES	Executive Officer Approval for Institutional Memberships and Professional Organization Subscriptions; Supervisory Approval for Personal Memberships and Subscriptions	1000
Merchant Card Payment Processing	Purchases that involve the taking of payment must be reviewed by the AVP Controller.	N/A	NO	NO	NO	NO	AVP Controller	1000
Preferred Supplier Payments	Purchasing has negotiated preferred rates with certain providers. The list of providers and preferred purchasing method can be found on the Purchasing website. In the normal course of business, departments must use these providers to ensure that the University receives the benefit of the pricing and keep costs down. For questions about preferred provider arrangements, contact Purchasing.	N/A	N/A	N/A	YES	YES	Purchasing	1000
Previously Contracted Fees	Benefits, insurance, mortgages, utility bills, payroll and other University wide contracted obligations may be paid by the department administering the obligation using a PV or the P-Card. If there is a contract it should be signed by Purchasing. Payments may be authorized by a fund signer that is responsible for confirming that services or goods have been received.	N/A	NO	NO	YES	YES		1000
Printing/Photocopying	All printing must be purchased through the University Services Print Shop or through UCM unless quick copy services are needed outside of normal business hours.	N/A	>\$10K	\$10K or <	YES	YES	University Services and or UCM	1360, 488
Radioactive Materials	All radioactive materials must be purchased by the Laboratory Compliance Manager in the Research Office.	N/A	RQD	N/A	YES	YES	Research Office	620
Radio Communication Equipment	All radio communication equipment purchases must be reviewed by the Police Department.	N/A	>\$10K	\$10K or <	YES	YES	OU Police Department	655
Refunds	To process a refund, submit the deposit slip and supporting documentation with the Payment Voucher.	N/A	NO	NO	YES	NO		1000

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Reimbursements Employee Purchase \$500 or less	Employees may make small dollar (<=\$500.00) out of pocket purchases and be reimbursed as long as the purchase does not circumvent other policies and procedures. Payments for software, payments to individuals and purchases from the OU bookstore will not be reimbursed. Employees must participate in direct deposit to receive reimbursement.	N/A	N/A	N/A	YES	NO		1000
Rental Vehicles	Please see Policy 1200 for more.	N/A	NO	NO	NO	NO		1050, 1200
Security Equipment	All security equipment purchases must be reviewed and approved by the Police Department.	N/A	>\$10K	\$10K or <	N/A	YES	OU Police Department	674, 675
Services								
Professional Services \$10K or less	Consulting, training, design, and other professional services require an OU Services Agreement or contract approved by OLA. Send scope of work, W9, IC vs employee checklist and insurance.	N/A	N/A	N/A	YES	YES	Accounting, Risk Management, OLA	1000
Professional Services greater than \$10K	Complete a requisition and send to your buyer. Purchasing will determine purchase method. Send scope of work, W9, IC vs employee checklist and insurance. For any purchase under \$50K send comparative pricing.	N/A	>\$10K	N/A	YES	YES	Accounting, Risk Management, OLA	1000
Maintenance and Repairs	This section applies to maintenance and repair services for operations. For services provided on campus, a certificate of insurance is required (see Risk Management). Insurance is required for on campus services, regardless of payment method. See Independent Contractor above for information on requirements for paying individuals providing services.	N/A	>\$10K	\$10K or <	YES	YES	Accounting, Risk Management	1000
Signs								
Permanent	All permanent signs must be purchased by Facilities Management.	N/A	>\$10K	\$10K or <	YES	YES	Facilities Management	320
Temporary	All temporary signs must be reviewed by Communications & Marketing.	N/A	>\$10K	\$10K or <	YES	YES	UCM	320
Software	See Information Technology section above.							
Sponsorships and Donations	Sponsorship payment documentation for attended events must list the attendees. Sponsorship and donation payment documentation must explain how the payment supports the mission of the University. The Sponsorship or Donation must be in the name of Oakland University.	N/A	>\$10K	\$10K or <	YES	YES	Executive Officer	207

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Stipends and Awards	Student stipends and awards must be approved by and processed through the Financial Aid Office (FAO). Both employee and student stipends for services provided must be paid through the Payroll Office. If the FAO reviews a student stipend or award and determines that it must be paid through Accounts Payable, submit the Payment Voucher with all supporting documentation attached including the opinion from FAO. Reportable payments to students already on Payroll for the calendar year must be made through Payroll.	N/A	N/A	N/A	YES	NO	Financial Aid	1000
Students Payments	All non-payroll payments to students or on behalf of students, except for reimbursements, must be approved by the Financial Aid Office. All payments for work (including graduate student stipends) must be paid through payroll. The Financial Aid Office (FAO) must approve all payments made on behalf of students, regardless of payment method. Miscellaneous reimbursements for items purchased by the student but owned by the University do not have to be reported. Aside from the FAO requirement, payments made on behalf of students should follow the OU AP&P for that type of purchase.	N/A	N/A	N/A	YES	N/A	Financial Aid	1000
Telecommunications Equipment	All telecommunications equipment must be purchased by UTS.	N/A	>10K	\$10K or <	YES	YES	UTS	830
Textbooks	Textbooks purchased for student use must be purchased from the OU Bookstore, unless the Bookstore is unable to obtain the book. If the Bookstore cannot provide the book, use the procurement methods indicated here; documentation that the book was unavailable from the Bookstore must be included as part of the payment documentation.	N/A	>10K	\$10K or <	YES	YES		1000
Vehicles	All vehicle procurement (purchase or lease) requires a PO.	N/A	RQD	N/A	YES	YES		1000

Notes:

Abbreviations: OLA = Office of Legal Affairs, PO = Purchase Order, PV = Payment Voucher, RQD = Required, TES = Travel Expense Summary

>\$10K = must use PO if purchase amount is over \$10,000

The use of the PO or Service Agreement or Contract requires that the vendor receive a copy showing OU's terms and conditions before goods or services are provided.

If Required Policy is indicated, that policy must be reviewed before making a purchase to determine all of the requirements for that purchase.

If Special Approval Required is indicated, contact the department noted before making any arrangements for your purchase. Attach proof of approval to payment documentation.