WELCOME

Hi there! We are excited to share with you one of the tools that our procurement design team has created to make the purchasing process at UNC more clear and simple. The following page represents a decision tree that will help you know which purchasing method (e.g., ePro, P-card, PO, campus voucher) is most appropriate for each purchase you make.

HOW TO USE THIS TOOL

1. If you are purchasing a commodity start on page 2, if you are purchasing a service start on page 3.

2. Locate the "START HERE" at the top of the page.

3. Answer the first question and follow the line with your answer.

4. Respond to the question in the next box and repeat the process of following the line that corresponds to your answer. When you reach one of the light blue boxes that tells you what the recommended purchasing method is you have completed the selection process.

NOTE: For some questions, it will require additional information to answer (e.g., what items should be purchased on a campus voucher). This is noted by a purple numbered circle and please find the corresponding additional detail listed at the bottom of the page with the matching number.
Before using this decision tree, please confirm that you are purchasing a commodity (e.g., office supplies, meals for meetings, paint, software, gift cards).

If you are purchasing a service, use page 3, and if you are purchasing travel, please reference the travel website.

Is this purchase smaller than $5,000?

- No → Create requisition for a PO in Connect Carolina

Is the item or equivalent currently available on the ePro/Supplier catalog list below?

- Yes → Place order with ePro
- No → Based on the list below, are they a Customer Billing Management (CBM)/Bill Presentation Supplier?

Does this purchase fit one of the categories required to be purchased using a campus voucher?

- Yes → Make purchase, then submit invoice for payment by campus voucher
- No → Is this required to be a purchase order?

- Yes → Create requisition for a PO in Connect Carolina
- No → Is this purchase smaller than $5,000?

- Yes → Place order directly with the supplier
- No → See list below

Additional Details:

1. ePro/Supplier catalog list
   - Office Supplies
     - Staples Business Advantage
     - Store Office
   - Lab and Scientific Supplies
     - ARC3
     - Agilent
     - Airgas/National Welders
     - Bio-Rad Life Science
     - Fisher Scientific On Campus
     - Genesee Scientific
     - Life Technologies
     - Perkin Elmer
     - Qiagen
     - Roche
     - Sigma-Aldrich
     - VWR
   - Amazon Business
   - Maintenance Supplies
     - Applied Industrial Tech
     - Fastenal
     - Grainger
     - Graybar
     - MSC Industrial Supply
     - Mayer Electric
   - Computer Hardware/Software
     - Apple Computers
     - CDW-G
     - Dell
     - ITS Software Acquisitions (See ePro website)
     - Lenovo-CCI

2. CBM/Bill Presentation Supplier list
   - Carolina Dining
   - Carolina Inn
   - Computer Repair Service
   - Enterprise Vehicle Rental
   - Environment, Health, & Safety
   - Friday Center
   - Rizzo Center
   - Student Stores
   - UNC Police and Transportation & Parking

3. Items required to be purchased on a campus voucher
   - Rent/Lease (excluding reservation deposits which require a PO)
   - Unqualified scholarships, traineeships, and fellowships (confirm treatment on case-by-case basis with MOU business office)
   - Student and non-student awards
   - Health insurance reimbursement
   - Cash advance (including gift cards)
   - Royalties
   - Study subject payments or stipends
   - Independent contractors once approved (e.g., consultant fees, honorariums, instructional services, non-instructional services)
   - Professional services (e.g., legal fees, accounting/audit fees, medical fees)
   - Other Suppliers that do not accept P-Cards

4. Items required to be purchased on a purchase order
   - Suppliers that only accept Purchase Orders
   - Software licenses (not available on ePro)
   - Purchases where deposit is required (e.g., check with order)
   - Contract/Terms & Agreements need to be signed, regardless of amount

Stop when you reach a blue box, then take that purchasing action.
Procurement method selection – Services

Before using this decision tree, please confirm that you are purchasing a service (e.g., legal fees, accounting fees, car wash, honorariums, stipends).

If you are purchasing a commodities, use page 2, and if you are purchasing travel, please reference the travel website.

START HERE

Is this an independent contractor? (If unsure, contact your business officer or email IC_review@unc.edu)

Yes  No

Complete IC request process (See finance policy 708)

Is this purchase smaller than $5,000?

Yes  No

Based on the list below, are they a Customer Billing Management (CBM)/Bill Presentation Supplier?

Yes  No

Place order directly with the supplier

1. Create requisition in Connect Carolina
2. Approved to make purchase

Does this require a contract with terms and conditions?

Yes  No

Does this Supplier fit one of these categories that is required to be on a campus voucher?

Yes  No

Create requisition for a PO in Connect Carolina

Is this required to be a purchase order?

Yes  No

Make purchase, then submit invoice for payment by campus voucher

Create requisition for a PO in Connect Carolina

Place purchase using a P-Card (request sales tax exemption from Supplier)

STOP HERE

See list below

See list below

See list below

See list below

Additional details

1. Greater than $5k PO exceptions
   - Accounting fees
   - Advertising fees
   - Legal fees

2. CBM/Bill Presentation Supplier list
   - Carolina Dining
   - Carolina Inn
   - Computer Repair Service
   - Enterprise Vehicle Rental
   - Environment, Health, & Safety
   - Friday Center
   - Rizzo Center
   - Student Stores
   - UNC Police and Transportation & Parking

3. Items required to be purchased on a campus voucher
   - Rent/Lease (excluding reservation deposits which require a PO)
   - Unqualified scholarships, traineeships, and fellowships (confirm treatment on case-by-case basis with MOU business office)
   - Student and non-student awards
   - Health insurance reimbursement
   - Non-employee non-student individual travel reimbursement
   - Cash advance (including gift cards)
   - Royalties
   - Study subject payments or stipends
   - Independent contractors once approved (e.g., consultant fees, honorariums, instructional services, non-instructional services)
   - Professional services (e.g., legal fees, accounting/audit fees, medical fees)
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For more information: https://finance.unc.edu/departments/strategic-sourcing-payment/procurement/