

Guidelines for Expenditures

Source of Funds

Category	Expense Type	Source of Funds				Requisition	Pre-Approval Level	Pcard	Comments
		State	Local	APID					
Advertisements	a. Human Resource recruiting	Yes	Yes	<\$5K	>=\$5K	HR	Yes	Must include Affirmative Action Statement	
	b. Student and individual school recruitment	Yes	Yes	<\$5K	>=\$5K	FO	Yes		
	c. Marketing	Yes	Yes	<\$5K	>=\$5K	FO	Yes		
	d. Promotion of University Events	No	Yes	<\$5K	>=\$5K	FO	Yes		
Alcoholic Beverages	a. Public receptions/events	No	Yes	<\$5K	>=\$5K	VC	Yes	*PCE w/foundation	
	b. Instructional	Yes	Yes	<\$5K	>=\$5K	FO	Yes	PCE required	
	c. Entertaining official guest w/meal	No	No	N/A	N/A	N/A	Yes	*PCE w/foundation	
	d. Employee recruitment/interviews w/meal	No	No	N/A	N/A	N/A	Yes	*PCE w/foundation	
Consultants, speaker fees, honorariums, payments to individuals, performers, professional and artistic services		Yes	Yes	<\$5K	>=\$5K	FO	No	No Venmo Stipend payments can be processed via APID ICAF may be required****	
Contributions/Donations to other entities	(for sponsorship, or event participation see Advertisements)	No	No	N/A	N/A	N/A	No	Not allowed	
Charter of Bus		Yes	Yes	N/A	Yes	FO	No	Requisition is required	
Decorations/cards	a. Donor Outreach Greeting cards	No	No	N/A	N/A	FO	Yes	*PCE w/foundation	
	b. General campus	No	Yes	<\$5K	N/A	FO	Yes	Must be in public places	
	c. Public area/department decor	No	Yes	<\$5K	N/A	FO	Yes		
	d. Public area/department (holiday, special occasions, seasonal)	No	Yes	<\$5K	N/A	VC	Yes	Dean/Director office or above	
	e. Individual office decorations	No	No	N/A	N/A	FO	No	Not allowed	
	f. Electronic/paper greeting cards (e.g., retirement, get-well, sympathy)	No	No	N/A	N/A	FO	No	Not allowed	
	g. University Wide events	No	Yes	<\$5k	N/A	N/A	Yes		

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Membership Dues	a. Institutional	Yes	Yes	<\$10K	>=\$10K	FO	Yes		
	b. Individual - Civic	Yes	Yes	<\$10K	>=\$10K	FO	Yes	Only if relevant to employee's position	
	c. Individual - Professional licenses	Yes	Yes	<\$10K	>=\$10K	FO	Yes	Only if relevant to employee's position	
	d. Individual - Professional organizations	Yes	Yes	<\$10K	>=\$10K	FO	Yes	Only if relevant to employee's position	
Flowers/Plants	a. Instructional purposes	Yes	Yes	Yes	N/A	FO	Yes		
	b. Public university events i.e. graduation, university ceremonies for display/decorations	No	Yes	Yes	N/A	FO	Yes		
	c. Student, donor, guest, employee congratulatory, award, personal occasions, etc.	No	No	N/A	N/A	FO	Yes	*PCE w/foundation	
	d. Employee retirement	No	No	N/A	N/A	FO	Yes	*PCE w/foundation	
	e. Special occasions (baby showers, birthdays, student or employee appreciation)	No	No	N/A	N/A	FO	N/A		
	f. Funeral/Illness (employee past or present, employee immediate family, friends, donors, students)	No	No	N/A	N/A	FO	Yes	*PCE w/foundation See also Policy 5D3	

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Food and Meals Employees	1. Athletic Team Meals	No	Yes	<\$5K	N/A	FO	Yes	PCE required	
	2. Department social activity – holiday parties, appreciation events, receptions, etc.	No	No	N/A	N/A	N/A	N/A		
	3. Official guest	Yes	Yes	<\$5K	N/A	VC	Yes	PCE required	
	4. New Employee Orientations	No	No	N/A	N/A	N/A	Yes	*PCE w/foundation	
	5. Retreat/Team Building**	No	Yes	<\$5K	N/A	VC	Yes	PCE w/VCA approval	
	6. Working meals**	No	Yes	<\$5K	N/A	VC	Yes	PCE required	
	7. Employee recruitment & interviews	Yes	Yes	Yes	N/A	VC	Yes	PCE required	
	8. Retirement receptions***	Yes	Yes	N/A	N/A	VC	Yes	PCE required	
	9. Fundraising	No	No	N/A	N/A	N/A	Yes	*PCE w/foundation	
	10. Official University functions/receptions/SIUE Employee of the Month	Yes	Yes	<\$5K	>=\$5K	VC	Yes	PCE required	
Food and Meals Students	1. Athletic Team Meals	No	Yes	Yes	N/A	FO	Yes	PCE required	
	2. Conference/Event on behalf University (Travel Status)	Yes	Yes	Yes	N/A	FO	No	Per Diem allowed only	
	3. Course related events and trips	Yes	Yes	Yes	N/A	FO	Yes	PCE required or Per diem	
	4. University wide sponsored functions/receptions	Yes	Yes	<\$5K	>=\$5K	VC	Yes	PCE required	
	5. Individual School/College wide sponsored functions/receptions	No	Yes	<\$5K	>=\$5K	VC	Yes	PCE required	
	6. Department social activity – holiday parties, appreciation events, social receptions, etc.	No	No**	N/A	N/A	N/A	N/A		
	7. Residence hall programs	No	Yes	<\$5K	N/A	VC	Yes	PCE required	
	8. Recruitment/Retention	Yes	Yes	<\$5K	N/A	VC	Yes	PCE required	
	9. Orientations	Yes	Yes	<\$5K	N/A	VC	Yes	PCE required	
Gift Cards	Research Incentives	Yes	Yes	Yes	N/A	FO	Yes	PCE required	
Gifts	Any type – includes gift cards	No	No	N/A	N/A	N/A	Yes	*PCE w/foundation	
Insurance	Any type	No	No	N/A	N/A	FO	No	*Foundation only	
Moving Expenses		Yes	Yes	<\$5K	>=\$5K	VC	No		
Prizes	Any type – including gift cards	No	Yes	<\$5K	>=\$5K	FO	Yes	PCE required for gift cards	

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		State	Local	APID					
Promotional Items & Giveaways	a. School and Student Recruitment	Yes	Yes	<\$5K	>=\$5K	FO	Yes		
	b. Giveaways relevant to University business to non-employees	No	Yes	<\$5K	>=\$5K	FO	Yes		
Refreshments i.e. Snacks and Beverages	Within the scope of University operations	Yes	Yes	<\$5K	>=\$5K	VC	Yes	PCE required No personal/no staff meeting Must be Pepsi products	
Student Events	a. Orientations/receptions	Yes	Yes	<\$5K	>=\$5K	FO	Yes		
	b. Departmental events	No	No	N/A	N/A	N/A	Yes	*PCE w/foundation	
	c. Resident Hall programs	No	Yes	<\$5K	>=\$5K	FO	Yes		
	d. Recruitment	Yes	Yes	<\$5K	>=\$5K	FO	Yes		
	e. Entertainment i.e. concerts, theme parks, athletic events, etc.	No	Yes	<\$5K	>=\$5K	FO	Yes	PCE required	
Subscriptions	a. Professional journals	Yes	Yes	<\$10K	>=\$10K	FO	Yes	University business only	
	b. News publications	Yes	Yes	<\$10K	>=\$10K	FO	Yes		
Trophies/Plaques	a. Employee award/Incentive programs	No	No	<\$5K	N/A	FO	Yes	*PCE w/foundation	
	b. Student awards	No	Yes	<\$5K	N/A	FO	Yes	PCE required	
	c. Non-employee award/recognition	No	No**	<\$5K	N/A	FO	Yes	*PCE w/foundation	
Wearing apparel	a. Employee	Yes	Yes	<\$5K	>=\$5K	VC	Yes		
	b. Students	Yes	Yes	<\$5K	>=\$5K	FO	Yes		
	c. Items for resale to employees (all applicable sales tax must be paid)	No	Yes	<\$5K	N/A	FO	Yes		
	d. Friends/donors	No	No	<\$5K	N/A	FO	Yes	*PCE w/foundation	

Notes: State fund Budget Purpose numbers ex. 72XXXX

Local fund all other 73XXXX, 74XXXX, 75XXXX, 76XXXX, 77XXXX

***Foundation funds = Non-University funds 78XXXX requires approval from foundation. Some activities/items may be granted on a case by case basis.**

****Permitted only when University business cannot be accomplished in any other way or when the meal has been incorporated into the funding of the program such requests are subject to review. Programs must incorporate University business at its core. Allowed during times when employees are away from their normal working environment. Use of a local account may be allowed if funds were collected for participation or awards. Such activities/items may be granted on a case by case basis.**

*****If using Catering Services**

******Independent Contractor Analysis Form required for most payments to individuals**