

## Quick Reference Guide: Forms <sup>[1]</sup>

- Forms Completed in CU Marketplace
- Forms Completed Outside CU Marketplace

When you need to...	Complete the...	Additional Considerations
<p>...authorize payment for an invoice when a Purchase Order or other commitment voucher is not applicable. Refer to the PSC Procedural Statement (PPS) Payment Voucher/Authorization <sup>[2]</sup> – or the form itself – for appropriate uses of this form.</p>	<p>Payment Voucher form <sup>[3]</sup></p>	<ul style="list-style-type: none"> <li>• Supporting documentation, as detailed in the PPS, must be attached to the Payment Voucher form.</li> <li>• Complete one Payment Voucher form for each invoice.</li> <li>• Add only one Payment Voucher form to your shopping cart.</li> <li>• Payment Voucher forms do not create an order or an encumbrance...they simply result in payment.</li> </ul>
<p>...all purchase requests outside of catalog orders will utilize the purchase requisition form.</p>	<p>Purchase Requisition Form <sup>[4]</sup></p>	<ul style="list-style-type: none"> <li>• Purchase goods/services from a non-catalog supplier.</li> <li>• For purchases related to a subcontract or construction.</li> <li>• Blanket purchase orders, make repetitive purchases from a non-catalog supplier over a period of time</li> <li>• Request approval to pay an invoice in an After-the-Fact situation (when an organizational unit makes a commitment over \$10,000 before the PSC issues a purchase order)</li> </ul>

Additional forms, available on the PSC website <sup>[5]</sup>, might also be needed to process your purchase in CU Marketplace. Submission instructions for **completed** forms – which may include attaching in CU Marketplace – are given at the bottom of each form.

When you need to...	Complete the...	Additional Considerations
...purchase services from an independent contractor, whether an individual or a sole proprietor operating under a Social Security Number.	Scope of Work (SOW) form <sup>[6]</sup>	Refer to the Employee Services Scope of Work (SOW)/Independent Contractor. <sup>[7]</sup>
...purchase goods/services for an official function where: <ul style="list-style-type: none"> <li>1. alcoholic beverages are being purchased in any dollar amount, or</li> <li>2. the total food/beverage cost exceeds \$500, or</li> <li>3. the per-person cost exceeds \$85 regardless of total cost.</li> </ul>	Official Function (OF) form <sup>[8]</sup>	Refer to the Finance Procedural Statement: Official Functions. <sup>[9]</sup>
...request the PSC to change the SPO accounting information (SpeedType and/or Account, and/or Report Line Comment) on an individual SPO invoice.	SPO/BPO Invoice Allocation form <sup>[10]</sup>	The SPO must have only <b>one</b> accounting distribution to change the invoice's allocation using this form.
...request an honorarium payment greater than \$100 to an associate or other individual.	Honorarium (HNR) form <sup>[11]</sup>	
...make a full or partial payment to a supplier (vendor) – greater than \$10,000 – prior to the University receiving the goods/services.	Advance Payment to Suppliers (ADV) form <sup>[12]</sup>	Refer to the PSC Procedural Statement Advance Payment to Suppliers. <sup>[13]</sup>
...purchase goods or services greater than or equal to \$50,000	Sole Source Justification Form <sup>[14]</sup>	Refer to Procurement Rules <sup>[15]</sup> . This form is required for every purchase of over \$50,000 unless the purchase is made from an existing contract, the supplier is specifically named in a grant award, or the purchase has been competitively solicited.

**Source URL:** <https://www.cu.edu/psc/forms/quick-reference-guide-forms>

### Links

[1] <https://www.cu.edu/psc/forms/quick-reference-guide-forms> [2] <https://www.cu.edu/psc/policies/psc-procedural-statement-payment-voucher-authorization> [3] <https://pschelp.cu.edu/s/article/CU-Marketplace-Payment-Voucher> [4] <https://pschelp.cu.edu/s/article/CU-Marketplace-Purchase-Requisition> [5] <https://www.cu.edu/psc/forms-0> [6] <https://www.cu.edu/docs/scope-work-sow-submission-guide> [7] <https://www.cu.edu/docs/scope-work-sow-form> [8] <https://www.cu.edu/controller/forms/official-function> [9] <https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-official-functions> [10] <https://www.cu.edu/psc/forms/spo-invoice-allocation-spo> [11] <https://www.cu.edu/psc/policies/honorarium-hnr> [12] <https://www.cu.edu/psc/forms/advance-payment-suppliers>

[13] <https://www.cu.edu/psc/psc-procedural-statement-advance-payment-suppliers>

[14] <https://www.cu.edu/doc/sole-source-justification-form-101824docx-1>

[15] <https://www.cu.edu/psc/policies/procurement-rules>