

Purchasing Guidelines for Employee Training

Below are some brief guidelines depending on the type and total amount of employee training being purchased:

Training > \$5,000

- Any training fee totaling over \$5,000 will always need to be submitted as a requisition to the purchasing department
- Per University policy (and as a good business practice in general), payment should not be made prior to services being rendered. If the vendor requires alternate terms, Purchasing will need to coordinate with the vendor and the department to determine whether an exception can be granted. It is helpful to add this exception request (along with the reason that the vendor is requesting this exception) to the comments section when submitting the requisition so that Purchasing is aware.

Online Training < \$5,000

- Allowable to pay up front if necessary to "hold a spot" for the class
- If possible, always ask for a hard copy of the registration terms and conditions prior to payment for the class
- If there are terms and conditions that require a signature, send to Purchasing prior to payment

Off-Site Local Training < \$5,000

- Allowable to pay up front if necessary to "hold a spot" for the class
- If possible, always ask for a hard copy of the registration terms and conditions prior to payment for the class
- If there are terms and conditions that require a signature, send to Purchasing prior to payment

Off-Site Non-Local Training

- Training registration fees should be included as part of the Travel Authorization
- Once the TA is approved, these registration fees can be paid up front in order to "hold a spot" for the class

On-Site Training < \$5,000

- Need a contract or some sort of document outlining the terms and conditions of the service; this needs to be sent to Purchasing for their approval prior to payment
- No payment should be made prior to the training unless specifically approved by Purchasing
- Acceptable to pay up front for course materials received prior to the training

Questions? Contact the McKimmon Finance and Business Office at mckimmonaccounting@ncsu.edu