Special Approval Spend Categories

Auto-Routing:　The following purchase requests and/or payment requests will automatically route for special approval in Workday:

Products or Services	Example Spend Categories	Reviewing Department for Health System[1]	Reviewing Department for Non-Health System Areas	Reason for Review
Advertising ($25,000 and over for Non-Health System)	Digital Advertising Services, Non-Digital Advertising Services	Health System Marketing and Communications	Office of Marketing and Communications	Mitigates risk of using branding materials outside of approved vendors and events.
Communications, Public Relations and Marketing Services $25,000 and over	Professional Services – Public Relations and Communications, Marketing Services	Health System Marketing and Communications	Office of Marketing and Communications	Monitors requests to ensure leadership involvement, provide for standardization.
Controlled Substances	Drugs - Controlled	Health System Pharmacy	Varies	Monitor reason and purchase of control substances outside of pharmacy.
Copiers	Office Equipment - Copiers	Office of Business and Finance, UniPrint	Office of Business and Finance, UniPrint	Ensures compliance of university wide contract.
Equipment leases		Office of Business and Finance, Financial Services	Office of Business and Finance, Financial Services/Treasurer's Office	Reviews lease versus purchase options.
Explosive Chemicals	Chemicals - Explosives	Health System Security Administration	Office of Administration and Planning, Environmental Health & Safety	Monitors explosive chemicals on campus.
Facilities Operations	Building and Construction Materials, Maintenance, Roads and Grounds	Facilities Operations and Development (FOD)	Facilities Operations and Development (FOD)	Ensures necessary planning for approvals and standardization.
Financial Products	Equipment Loans, Financial Services – Accounting, Financial Services – Audit	Health Systems Financial Services	Office of Business and Finance	Reviews to ensure meets university policies, standards, and compliance of products.
Furniture	Furniture - Cafeteria, Furniture - Office, Furniture - Residential	Facility and Planning	Office of Business and Finance, University Purchasing	Ensures furniture being purchased aligns with contracts and branding of the university.
Gas Cylinders	Chemicals - Gases, Med Supplies - Gas Cylinders, Gas Delivery	Office of Business and Finance, Purchasing, Gas Cylinder Warehouse	Office of Business and Finance, Purchasing, Gas Cylinder Warehouse	Monitors gas cylinder usage, rentals, and products on campus.
Imaging	Med Equipment - Imaging and Nuclear Med	Health System Clinical Engineering	No Reviewing Department	Ensures compliance of imaging equipment meets standards of clinical engineering.
Insurance	Insurance or Insurance Services	Office of Business and Finance, Risk Management, in consultation with the Health System	Office of Business and Finance, Risk Management	Ensures correct type of insurance need/coverage limits, trends and analysis of agency insurance spend.
IT - See also cloud-based software and digital services in the table below	Computer Accessories, Software, Communication Devices, professional IT services	Health System IT	Unit IT or Managed IT Services	Reviews to ensure meets university standards and compliance of products.

[1]Health System - University Hospital, East Hospital, Brain and Spine Hospital, Richard M. Ross Heart Hospital, Harding Hospital, Dodd Rehabilitation Hospital, Ambulatory Clinics and Services, and Arthur G. James Cancer Hospital and Richard J. Solove Research Institute and Outreach Sites.

Products or Services	Example Spend Categories	Reviewing Department for Health System[1]	Reviewing Department for Non-Health System Areas	Reason for Review
Legal	Legal Services, Intellectual Property Rights Fees	Office of Legal Affairs	Office of Legal Affairs	Reviews documentation and ensure request aligns with university policies, terms and conditions.
Management Consulting $75,000 and over	Management Consulting	President's Cabinet	President's Cabinet	Monitors requests to ensure leadership involvement.
Medical Equipment, Medical Maintenance and Repairs	Med Equipment - Beds and Accessories, Infusion Pumps, Patient Lifts, Medical Maintenance Agreements	Clinical Engineering	No reviewing department	Reviews for product standards, implements medical technology, and ensures products meets healthcare standards for patient care.
Radioactive Drugs/ Pharmaceuticals	Drugs - Radiopharma and Contrast Media	Health System Nuclear Pharmacy	Office of Administration and Planning, Environmental Health & Safety	Ensures and monitors the amount and intake of radioactivity on campus.
Radioactive Materials	Atomic and Nuclear Energy Equipment, Radioactive Chemicals, Radioactive Fuel	Office of Administration and Planning, Environmental Health & Safety	Office of Administration and Planning, Environmental Health & Safety	Ensures and monitors the amount and intake of radioactivity on campus.
Real Estate	Real Estate Rentals (includes real estate leases), Real Estate Services	Office of Administration and Planning, Planning, Architecture, and Real Estate (PARE) Office of Business and Finance, Financial Services (leases only)	Office of Administration and Planning, Planning, Architecture, and Real Estate (PARE) Office of Business and Finance, Financial Services (leases only)	Ensures space has been approved by the Office of Administration & Planning. Ensures that leases are compliant and tracked by the Office of Business and Finance
Security and Safety Supplies	Security Equipment and Accessories, Security Services, Weapons and Ammunition	Health System Security Administration	Office of Administration and Planning, Department of Public Safety	Reviews purpose of purchase and ensures safety of purchasing these types of materials.
Signage	Signage permanent or temporary and signage equipment	Office of Administration and Planning, Health System Facility Management	Office of Administration and Planning, Facilities Operations and Development	Reviews to ensure signage adheres to branding standards, placement compliance, and overall aesthetics of the university. Campus Signage and Graphics policy
Sponsorships ($10,000 and over for Health System)	Sponsorships	Health System Civic and Community Engagement, and Health System Marketing and Communications	Office of Outreach and Engagement	Ensures policies are met.
Utilities	Chilled Water, Electric, Water/Sewer	Office of Business and Finance; Senior Director, Comprehensive Energy Management	Office of Business and Finance; Senior Director, Comprehensive Energy Management	Reviews enterprise wide utilities to ensure appropriateness of transaction.
Vehicles	Vehicles not aircraft	Office of Administration and Planning, Transportation and Traffic Management	Office of Administration and Planning, Transportation and Traffic Management	Ensures vehicles are tagged, inspected, and maintained appropriately by university guidelines. University Fleet policy
Vending	Vending machines	Office of Business and Finance, University Purchasing, and Health System Supply Chain Office of Legal Affairs	Office of Business and Finance, University Purchasing, Office of Legal Affairs	Reviews to ensure procurement of vending services are within state law and university contracts.

Prior Approval Needed: Special processes should be followed <u>prior</u> to initiating purchases of the following products and services:

Product or Service	Process	Additional Resources
Aircraft	Aircraft purchases should be reviewed by subject matter experts. Unmanned aircraft system purchases must adhere to the Use of Unmanned Aircraft Systems (UAS) policy.	Use of Unmanned Aircraft Systems (UAS) policy
Alcohol (non-clinical or non-research purposes)	The purchase of alcohol must align with university policy, and the Authorization to Serve Alcohol Request Form, if applicable.	Authorization to Serve Alcohol Request Form Alcohol and Other Drugs policy Expenditures policy
Capital leases and other forms of financing	Capital leases and other forms of financing, including relationships with outside entities and internal loans, can affect the university's credit capacity and/or bond rating. They must be reviewed with the Office of Business and Finance.	Office of Business and Finance
Cloud-based Software	Requests to use cloud-based software must be reviewed with OCIO Cybersecurity to assure the type and level of data being stored meet all IT security requirements.	Information Technology (IT) Security policy OCIO Cybersecurity Team
Digital services, e.g. applications, software	Requests to store information via digital services must meet the requirements set forth in the Digital Accessibility policy to ensure equal access for all constituencies (students, prospective students, faculty, staff, student employees, guests, visitors, and program participants with disabilities).	Digital Accessibility policy OCIO Digital Accessibility Services Team
Fire Safety Equipment, e.g., alarms, extinguishers, smoke detectors, sprinklers, or furnish and installation of these types of equipment	Purchase of fire safety equipment should be reviewed before purchase with the Department of Public Safety, which identifies frequency of inspections and compatibility, communicates guidelines, certifications, standards for services and inspections for proprietary parts, equipment, and systems.	Department of Public Safety
Mailing Services	Except for regional campuses and OSU Extension, all units should use centralized University Mail Services for mailing lists, postage meters, stamps, printed mailing labels, and related services.	Mail Services
Repair, Renovation, and Maintenance	The Facilities Design and Construction (FDC) team oversees campus design, construction, and renovation projects; technical support services; and building design standards. FDC staff includes project delivery teams, technical services, and project controls services.	Facilities Design and Construction (FDC)