IT Purchases 10K and Under

STOP and DO NOT proceed if any of the following exists:

- ☐ Supplier documentation has a link to terms and conditions or has terms and conditions included. Note: suppliers almost always include links, so review documentation for hidden links or reference to terms and conditions. Purchasing is the only department that has signing authority.

- ☐ Supplier requires approval of their CLICK THROUGH agreement online or via a renewal. Purchasing MUST review prior to approval.

- ☐ Purchase requires Risk and Compliance Review (examples include, but are not limited to, digital interface, software, licenses, or systems that can store, manage, control, manipulate or retrieve information/data for human interaction, including videos, platform, web content/web development, and communications products)

- ☐ Purchase involves Credit Card processing/Merchant Account/Services setup “PCI” – Alisha Cash Palas from Treasurer’s Office must approve first.

Steps for IT purchases under $10,000

☐ Contact the respective Purchasing Agent responsible for this Commodity

☐ Email the Purchasing Agent:

- ☐ The FINAL Risk and Compliance/ICT/Compliance results email, if applicable.

- ☐ All supporting documentation such as renewal, scope of work, unsigned contract, quote...etc. Purchasing must have supporting documentation in order to process properly.

- ☐ The underlying/original agreement, IF applicable. Please check the term of the contract to ensure it is an active contract. *Please note: Pre 2010 contracts will require our contracts team to update our University terms and conditions.

- ☐ The suppliers contract contact including contact name and email address, when applicable. This ensures Purchasing is contacting the correct person, which helps expedite the request.

☐ IF the underlying is still active, please request the supplier reference the underlying agreement on any supporting documentation mentioned above, when applicable.

☐ The purchase order (PO) will be issued once the Contract has been Executed OR Purchasing has provided approval to proceed.
Steps for IT Purchases $10k and greater
☐ Submit Requisition

☐ Attach:

☐ The Final Risk and Compliance/ICT/Compliance results email to requisition, if applicable.

☐ All supporting documentation such as renewal, scope of work, unsigned contract, quote...etc. to Requisition. Purchasing must have supporting documentation in order to process properly.

☐ The underlying/original agreement, IF applicable to Requisition. Please check the term of the contract to ensure it is an active contract. *Please note: Pre 2010 contracts will require the contracts team to update the University’s terms and conditions.

☐ Supplier’s Price Cost Analysis email, unless otherwise stated on the supplier documentation.

☐ IF the underlying is still active, please request the supplier reference the underlying agreement on any supporting documentation mentioned above, when applicable. Purchasing can assist.

☐ Include the suppliers contract contact such as contact name and email address, when applicable. This ensures Purchasing is contacting the correct person, which helps expedite the request.

☐ Reference old PO/SPO, when applicable.

☐ Ensure you are using the correct commodity code. If you are using a consultant, but they will have access to our systems, websites, or any data, please use commodity code 21 “IT Professional Services”.

☐ PO ISSUED by Purchasing.