IT Procurement Checklist

A Guide for Technology Purchases

STOP: Review Before Purchasing

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

- ☐ **Review supplier documentation for terms and conditions.** Terms may be included directly in the documentation or incorporated through hyperlinks or references to online terms.
  Note: Carefully review quotes, order forms, and other supplier documentation for embedded or referenced terms and conditions.
- ☐ **Supplier requires acceptance of a click-through agreement,** including as part of an online purchase or renewal. PSC Procurement must review the agreement before it is accepted.
- ☐ **Purchase requires campus Security and Compliance review.** Examples include, but are not limited to, software, licenses, cloud services, digital interfaces, websites, applications, and systems that access, store, process, transmit, or manage University information. Departments must follow their respective campus review requirements and obtain applicable approvals before purchasing.
- ☐ **Supplier contract or other binding agreement requires signature.** Do not sign or accept supplier contracts or other binding agreements unless you have delegated contracting authority. Submit the agreement to PSC Procurement for review and signature when required.
- ☐ **Purchase involves credit card processing, merchant account, or merchant services setup** (PCI). Treasury approval is required before proceeding.

If any apply, STOP. Do not purchase, sign, or accept supplier terms. Follow the applicable PSC process in the next section.

IT Purchases $10K and Under

1. **Submit to PSC Procurement via the Small Dollar Request form:** CU Marketplace Small Dollar Contract Request Form
2. **Attach the final campus security, compliance, and accessibility review results or approval documentation,** if applicable.
3. **Attach all supporting documentation,** such as **renewal documentation,** scope of work, unsigned contract, quote, etc. PSC Procurement must have the applicable supporting documentation to properly review and process the request.
4. **Attach the underlying/original agreement, if** applicable. Review the agreement term and, if the underlying agreement is still active, request that the supplier reference it on the new contract, renewal, quote, scope of work, or other applicable documentation. This helps ensure the documents are contractually linked.
5. **Provide the supplier's contract contact name and email address.** This ensures PSC Procurement is contacting the appropriate individual and helps expedite the request.
   ***Note:** Providing only a generic email address may result in delays.*
6. **PSC Procurement will notify the department** once the contracting/procurement process is complete. The department may then proceed with the applicable purchasing method, such as issuing a PO or purchasing via PCard, as authorized.

IT Purchases $10K to $250K

Steps for IT Purchases between $10K and $250K

1. **Submit a requisition in CU Marketplace.**
2. **Complete all required requisition information and questions.** Include any applicable prior PO or BPO references.
3. **Attach all applicable supporting documentation,** examples include, but not limited to:
   - Quote
   - Scope of Work
   - Unsigned contract or agreement
   - Renewal documentation
   - Final campus security, compliance, and accessibility approval documentation, if applicable
   - Underlying/original agreement, if applicable
4. **For purchases under an existing agreement,** review the agreement term and, if still active, ask the supplier to reference the underlying agreement on the applicable quote, renewal, SOW, or other purchasing document. PSC Procurement can assist if needed.
5. **Provide the supplier's contract contact name and email address,** when applicable. Providing the appropriate contact helps PSC Procurement work directly with the supplier and may help avoid delays.
6. **Select the appropriate commodity code.** Refer to the PSC Commodity Listing for guidance.
7. **PSC Procurement reviews and processes the request.** Once all applicable procurement and contracting requirements are complete, PSC Procurement will issue the PO.