IT Procurement Checklist

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 $10K and Under**

- Contact the respective Purchasing Agent responsible for this **Commodity**

- Create a Small Dollar Contract Request Form with the following documents:
  - 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. **Note:** Pre 2020 contracts will require our contracts team to update our University terms and conditions.

  - The **suppliers contract contact including contact name and email address.** This ensures Purchasing is contacting the correct person, which helps expedite the request. **Note:** providing the Purchasing Agent with generic email addresses will result in multiple delays.

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

  - Purchasing Agent will notify department when the **Contract has been Executed.** Department takes the fully executed contract to issue a PO or purchase via P-Card.
IT Purchases Between $10K and $150K

Steps for IT Purchases between $10K and $150K

☐ 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.

☐ SSPR Form

☐ 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 2020 contracts will require the contracts team to update the University’s terms and conditions.

☐ *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.