

TechBuy Guidelines for Entering Requisitions for Equipment

The following guidelines are intended to provide assistance for individuals entering requisitions for equipment. The Purchasing/Contracting Department has made every effort to ensure that the guidelines are in compliance with university operating policies. However, in the event of conflict between these guidelines and operating policies, the operating policies shall prevail.

1. When entering a requisition for equipment use one of the following forms, as appropriate:
 - **Non-Catalog Form**—for equipment costing less than \$5,000 or when referencing a contract number for equipment
 - **Informal Bid (between \$5,000 and \$25,000)**—for equipment costing between \$5,000 and \$25,000
 - **Bid/Request for Proposal Form (above \$25,000)**—for equipment costing more than \$25,000 that is not on a contract, sole source or exempt
 - **Federal Equipment Bid Form (Under \$25,000 and/or Proprietary Purchases)**—for equipment purchased on federal funds costing between \$5,000 and \$25,000 or for proprietary purchases on federal funds
 - **Federal Equipment Bid Form (above \$25,000)**—for equipment purchased on federal funds costing more than \$25,000 that is not on a contract, sole source or exempt
 - **Justification of Proprietary Purchase**—for proprietary purchases
2. If your requisition does not require bids and you have a quote, be sure to attach that quote to the requisition as an **external** document. The quote becomes part of the electronic document and protects both the department and the vendor if questions arise later. If you have a quote, you will not have to itemize your transaction by line item (you can enter a lump sum).
3. If you plan to “sole source” your equipment purchase because there is only one manufacturer who can provide the equipment you need, then you must provide sufficient justification for that on either the **Federal Equipment Bid Form (under \$25,000 and Proprietary Purchases)** or **Justification of Proprietary Purchase** forms. Cost cannot be a factor in determining sole source.
4. If the vendor requires a deposit, please add a note about the amount required in the **Internal Notes** section. Please be aware of the following:
 - Deposits are not allowed HEAF funds (funds beginning with 13).
 - Deposits are limited to a maximum of 50% of total cost without the written authorization of the Director of Procurement Services or her delegate.
5. If your requisition requires bids or proposals, the requisitions must include thorough and complete specifications. The specifications must be sufficient to convey your needs but generic enough that the requisition is not proprietary.

Warning: *Do not copy the specs from someone’s brochure!* If the specs are so specific that another vendor cannot really bid on the requisition, then that vendor can file a formal protest. When a formal protest is filed, the entire requisition process is stopped until the protest is resolved. It is very important to get your specifications correct before the bids or proposals are opened. Changes to the specifications require an addendum, which can delay the award process.
6. It takes a minimum of several days to prepare either requisitions or formal solicitations for equipment, as these documents are reviewed carefully. In addition, requests are open for 14 days. Then when the bids/proposals are in, they are first reviewed by Purchasing and Contracting and then an evaluation team before the PO/Contract is awarded. Note: During this entire process, no one from the department should have any communication with a potential bidder/proposer. All questions should be referred to Purchasing and Contracting.

FUNDING NOTES:

- See “How to Use HEAF Funds” for more information on purchasing equipment on FOPs beginning with 13.
- If you are using sponsored program (SPAR) funds, be sure to check with the grant accountant prior to submitting the requisition to make sure the purchase is allowed.