| | How to Procure Goods/Services at UD - "Guided Buying" |
|---|---|
| **1** | **Are the goods/services available from an enabled catalog supplier?** [*Refer to the UDX Catalog Page*] <br> - YES, submit **CATALOG PURCHASE REQUEST** <br> - NO, go to step #2 |
| **2** | **Are the goods/services available from a supplier with an applicable UDX Contract (including State/Federal/GPO Contracts)?** [*Refer to UDX Contract Module, Procurement Website or contact Procurement*] <br> - YES, follow the method of engagement* of the contract (if any) and then go to step #4 <br> - NO, go to step #3 |
| **3** | **Are there multiple suppliers available AND is the expected price over the formal bid threshold ($50,000)?** <br> - YES, contact Procurement to commence RFX ("Sourcing") process <br> - NO, go to step #4 |
| **4** | **Are there multiple suppliers available AND is the expected price over the informal bid threshold ($5,000)?** <br> - YES, obtain multiple quotes† or proposals and then submit **NON-CATALOG PURCHASE REQUEST** <br> - NO, go to step #5 |
| **5** | **Are there multiple suppliers available AND is the expected price of the goods/services under the informal bid threshold ($5,000)?** <br> - YES, obtain matching quote†/proposal and then submit **NON-CATALOG PURCHASE REQUEST*** <br> - NO, go to step #6 |
| **6** | **Is there only one source for the goods/service AND the payment type is allowable per the Non-PO Payment Matrix?** <br> - YES, submit **NON-PO PAYMENT REQUEST*** <br> - NO, go to step #7 |
| **7** | Submit **NON-CATALOG PURCHASE REQUEST** (with completed Waiver of Bid PDF form and justification) |

*\* - use of a p-card, if available to the user and within the user's limits, may also be appropriate in this situation.*

*† - for guidance as to what should be in a quote, please see our <u>Quote Guidance document</u> .*

| | Catalog REQ Workflow | | |
|---|---|---|---|
| | **REQ Condition(s)** | **Responsible Party** | **Action(s)** |
| 1 | ALL REQS | **Requester** | Prepares and submits requisition |
| 2 | ALL REQS | **Purpose Code Approver ("COA")** | Reviews requisition and approves |
| 3 | If REQ = $5,000+ | **Dept. Purchasing Specialist** | Reviews requisition and approves |
| 4 | If REQ is funded by a grant | **Grants Approver** | Reviews requisition and approves |
| 5 | If commodity code on REQ is: <br> 3D Printers <br> Intrusion Alarms <br> Copiers <br> Electric Generators <br> X-Ray Equipment <br> Fume Hoods <br> Lab Use Refrigerators <br> Radioactive <br> Biocabinet/Hoods <br> Kitchen/Other Use Refrigerators <br> Software/Hardware/IT <br> Laser Equipment <br> Motor Vehicles <br> Capital Equipment | **Commodity Approver** | Reviews requisition and approves |
| 6 | ALL REQS | **UDX** | Issues PO;  UDX >>> Supplier and PeopleSoft |
| | *END OF PROCESS* | | |

| | Non-Catalog REQ Workflow | | |
|---|---|---|---|
| | **REQ Condition(s)** | **Responsible Party** | **Action(s)** |
| 1 | ALL REQS | **Requester** | Prepares* and submits requisition |
| 2 | ALL REQS | **Purpose Code Approver ("COA")** | Reviews requisition and approves |
| 3 | If REQ = $5,000+ | **Dept. Purchasing Specialist** | Reviews requisition and approves |
| 4 | If REQ is funded by a grant | **Grants Approver** | Reviews requisition and approves |
| 5 | If commodity code on REQ is:<br>3D Printers<br>Intrusion Alarms<br>Copiers<br>Electric Generators<br>X-Ray Equipment<br>Fume Hoods<br>Lab Use Refrigerators<br>Radioactive<br>Biocabinet/Hoods<br>Kitchen/Other Use Refrigerators<br>Software/Hardware/IT<br>Laser Equipment<br>Motor Vehicles<br>Capital Equipment | **Commodity Approver** | Reviews requisition and approves |
| 6 | ALL REQS | **Procurement Approver #1 (Buyer)** | Reviews requisition and approves |
| 7 | If REQ = $100,000+ | **Procurement Approver #2 (Manager)** | Reviews requisition and approves |
| 8 | If REQ = $250,000+ | **Procurement Approver #3 (CPO)** | Reviews requisition and approves |
| 9 | If REQ = $100,000+ AND no UDX Contract Linked | **VP/Dean** | Reviews requisition and approves |
| 10 | If REQ = $250,000+ AND no UDX Contract Linked | **EVP/Provost** | Reviews requisition and approves |
| 11 | If REQ = $1,500,000+ AND no UDX Contract Linked | **President** | Reviews requisition and approves |
| 12 | ALL REQS | **UDX** | Issues PO;  UDX >>> Supplier and PeopleSoft |
| | END OF PROCESS | | |

| * REQ Preparation Details | | | |
|---|---|---|---|
| **REQ Amt.** | **< $10,000** | **$10,000 - $249,999.99** | **$250,000+** |
| **Supplier Info** | Complete | Complete | Complete |
| **General Info** | Complete | Complete | Complete |
| **Internal Attachments (if no contract exists)** | N/A | Informal Bid Intake Form and CHECK BOX<br>- OR -<br>Waiver Intake Form and CHECK BOX | Waiver Intake Form and CHECK BOX |
| **External Attachments** | Supplier quote†/SOW/proposed agreement | Supplier quote†/SOW/proposed agreement | Supplier quote†/SOW/proposed agreement |
| **Contract (if applicable)** | *LINK* to UDX Contract<br>- OR -<br>*CHECK BOX* for "State/Fed/GPO" and add contract ref. # | *LINK* to UDX Contract<br>- OR -<br>*CHECK BOX* for "State/Fed/GPO" and add contract ref. # | *LINK* to UDX Contract<br>- OR -<br>*CHECK BOX* for "State/Fed/GPO" and add contract ref. # |

*† - for guidance as to what should be in a quote, please see our Quote Guidance document .*

| | REQ Condition(s) | Responsible Party | Action(s) |
|---|---|---|---|
| | **Non-PO Payment REQ Workflow** | | |
| **1** | ALL REQS | **Requester** | Prepares and submits requisition |
| **2** | ALL REQS | **Purpose Code Approver ("COA")** | Reviews requisition and approves |
| **3** | If REQ = $5,000+ | **Dept. Purchasing Specialist** | Reviews requisition and approves |
| **4** | If REQ is funded by a grant | **Grants Approver** | Reviews requisition and approves |
| **5** | ALL REQS | **UDX** | Routes REQ to **"Non-PO Payment Requests"** Folder *(accessible by Procurement Management for assignment)* |
| **6** | ALL REQS | **Procurement Approver #1 (AP Staff)** | Reviews requisition and approves |
| **7** | If REQ = $100,000+ | **Procurement Approver #2 (AP Manager)** | Reviews requisition and approves |
| **8** | If REQ = $250,000+ | **Procurement Approver #3 (CPO)** | Reviews requisition and approves |
| **9** | If REQ = $100,000+** | **VP/Dean** | Reviews requisition and approves |
| **10** | If REQ = $250,000+** | **EVP/Provost** | Reviews requisition and approves |
| **11** | If REQ = $1,500,000+** | **President** | Reviews requisition and approves |
| **12** | ALL REQS | **UDX** | Processes payment:  UDX >>> PeopleSoft |
| | *END OF PROCESS* | | |

** - and no UDX contract linked, or not Employee Benefit (NP-EMPBEN) or Utility (NP-UTILITY) payment