

# UNIVERSITY OF DELAWARE **EXCHANGE**

Completing a Requisition with a Waiver of Bid Request

**NEW PROCESS** effective 7/1/2022

*Revised 1/23/2023*

Effective 7/1/2022, the Waiver of Bid Request process in UD Exchange has changed.

Purchases that require a justification of waiver of bid are submitted via a Non-Catalog Requisition.

When submitting the Non-Catalog Requisition, you will need to select the Waiver of Bid Checkbox and attach the Waiver of Bid PDF form.



# Waiver of Bid Request Form

- This form must be completed when a unit seeks to procure goods or services valued at \$10,000 or greater and competition is restricted or limited and precludes the University from obtaining informal or formal bids, proposals, and quotes.
- The purpose of this form is to confirm that the requesting unit has taken the necessary steps and has provided documentation to demonstrate an appropriate justification for the requested procurement.
- Justification must be in accordance with University Procurement Policy ([Legacy Policy 5-01](#)) and applicable Federal, State and local laws, regulations, codes and ordinances.



# Why did the UDX process change?

- The previous UDX Waiver of Bid Request form did not always include information needed by the supplier (e.g., part numbers).
- The previous form was challenging for change requests, especially when the purchase exceeded ten line items.
- The new process allows a purchaser the flexibility to add the Waiver of Bid Request form as an attachment to a Non-Catalog requisition at any time during approval workflow. This is beneficial for users that may not be aware that their purchase requires a waiver of bid justification when they initially submit their requisition, taking the guesswork out of which form to select.



## Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

Here you'll find the goods and services you need. The greatly expanded *University of Delaware Exchange* provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.

Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email [procurement@udel.edu](mailto:procurement@udel.edu) if you have specific questions; chances are we are working on it!

## Quick Links

- [UD Exchange How To Guides](#)
- [How Do I Buy \\_\\_\\_\\_\\_ ???](#)
- [Commodity Code-Account Crosswalk](#)
- [Non-PO Payment Matrix](#)
- [Non-Catalog Item](#)
- [Request New Supplier](#)

## My Resources

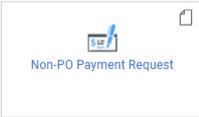
## My Resources

Product Release Library [📄](#) | [procurement@udel.edu](mailto:procurement@udel.edu)

[Site Map](#)

## Catalog &amp; Forms Showcase (Under Review)

## Procurement Forms



Non-PO Payment Request



Waiver of Bid Request

The Waiver of Bid Request tile in the Catalog and Forms Showcase is *no longer required*.

The tile now links you to information about our new process.

|         |                            |                          | Date ▾    | Total ▾       |
|---------|----------------------------|--------------------------|-----------|---------------|
|         |                            |                          | 9/10/2021 | 20,000.00 USD |
| 3337070 | August Martin Lab          | My Drafts                | 9/10/2021 | 10,000.00 USD |
| 3329263 | Cassidy PR creation        | My Returned Requisitions | 9/1/2021  | 2,000.00 USD  |
| 3328463 | Gel Pens Order from Mason. | My Returned Requisitions | 8/29/2021 | 804.04 USD    |
| -----   | -----                      | -----                    | -----     | -----         |



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Purchase Orders Search (Alt+Q) 0.00 USD

Shop (Alt+F) By Keyword Search...

Shopping

My Carts and Orders

Admin

Shopping Settings

Go To

- Shopping Home
- Advanced Search
- View Favorites
- View Forms
- Non-Catalog Item
- Quick Order
- New Shopping Experience

Browse By

- Suppliers
- Categories
- Contracts

Quick Links

- UD Exchange How To Guides
- How Do I Buy \_\_\_\_\_???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- Request New Supplier

My Resources

My Resources

Product Release Library | procurement@udel.edu

Site Map

Delaware Exchange provides a familiar online search for items by keyword or item number. If you can't find what you need, click on

Non-Catalog Item

Non-Catalog Item

Request New Supplier

You can also start from the link in Quick Links!

Begin with **Shopping > Non-Catalog Item** and proceed as outlined in the [Preparing a Non-Catalog Requisition](#) help guide.

Procurement Forms

- Non-PO Payment Request
- Subaward Request
- NIIMBL Subaward Request
- RFX Request (Option 2)
- Waiver of Bid Request

| Number  | Cart                       | Cart Type                | Date      | Total          |
|---------|----------------------------|--------------------------|-----------|----------------|
| 3328468 | 2021-08-12 twood 01 - CR   | My Drafts                | 8/29/2021 | 240,300.00 USD |
| 3328465 | Optimus Prime Project - CR | My Drafts                | 8/29/2021 | 37,000.00 USD  |
| 3328463 | Gel Pens Order from Mason. | My Returned Requisitions | 8/29/2021 | 804.04 USD     |
| 3328453 | 2021-08-28                 | My Drafts                | 8/28/2021 | 2,852.00 USD   |
| 3328425 | 2021-08-27 twood 01        | My Drafts                | 8/27/2021 | 40,000.00 USD  |

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## Shopping Cart • Shopping Cart



Assign Cart

Proceed To Checkout

Simple **Advanced**

Search for products, suppliers, forms, part number, etc. 🔍

Cart Name

Cassidy Powerwashing

Description

Multi-Invoice/Payment



Waiver of Bid

When your cart is complete, check the **Waiver of Bid** box.**Details** ▾

For

Dottie DPS

**Estimate (24,650.00 USD)** ▾Subtotal \* **24,650.00**Total \* **24,650.00****2 Items** □ ▾**CASSIDY PAINTING - 2 Items - 24,650.00 USD** ⋮ □

^ SUPPLIER DETAILS MAIN : 102 CASSIDY DRIVE, NEWPORT, Delaware 198... ▾

Contract *no value* PO Number To Be Assigned

Quote number JM-042319-1

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|------|-------------|----------------|------------|----------|------------|
|------|-------------|----------------|------------|----------|------------|

The required Waiver of Bid Request form you will need to attach to your requisition is available from the **Quick Links** section on the UD Exchange home page as well as the [UD Exchange Resources](#) page on the Procurement Services website.

## UD Exchange Resources

### Reference Materials

- [UNSPSC Code Lookup](#)
- [How Do I Buy ...?](#)
- [Non-PO Payment Matrix](#)
- [NPOP Account Codes with descriptions](#)
- [Commodity Code-Account Code Crosswalk PDF | EXCEL](#)
- [Commodity Code-Account Code Crosswalk FACILITIES PDF | EXCEL](#)
- [Commodity Reviewers](#)
- [Quote Guidance: What should be included on a quote?](#)
- [Freight: Recommendations for handling freight charges in UD Exchange](#)
- [Subaward Workflow](#)
- [Sample Invoice: What an invoice must include to be payable](#)
- [About Procurement Help: What it is and when to use it](#)
- [Procurement Processes for Award Payments](#)
- **New!** [Waiver of Bid Request Form - to be used with non-catalog requisition on or after July 1, 2022](#)

Quick Links ?

- [UD Exchange How To Guides](#)
- [How Do I Buy \\_\\_\\_\\_ ???](#)
- [Commodity Code-Account Crosswalk](#)
- [Non-PO Payment Matrix](#)
- [Non-Catalog Item](#)
- [NEW Waiver of Bid Form](#) ←
- [Request Contract](#)



**PURPOSE & INSTRUCTIONS**

THE PURPOSE of this form is to confirm the requesting unit has taken the necessary steps and provided documentation to demonstrate the appropriate justification for the requested procurement in accordance with [University Policy](#) and applicable Federal, State and local laws, regulations, codes and ordinances.

**THIS FORM MUST BE COMPLETED WHEN A UNIT SEEKS TO PROCURE GOODS OR SERVICES WITH A TOTAL VALUE OF \$10,000 OR GREATER IN SITUATIONS WHERE COMPETITION IS RESTRICTED OR LIMITED IN SUCH A MANNER THAT IT PRECLUDES THE UNIVERSITY FROM OBTAINING INFORMAL OR FORMAL BIDS/PROPOSALS/QUOTES**

Follow the instructions on the form.

**PLEASE BE ADVISED:**

- > Wherever possible, units should procure goods and services from suppliers that have active contracts in place with the University of Delaware. If the unit is utilizing an existing UD contract, check the Method of Engagement prior to completing this form.
- > If the unit has procured the requested goods or services by solicitation of bids/proposals/quotes, this form is **NOT** required.
- > No employee, officer, or agent may participate in the selection, award, or administration of a contract if they have a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of their immediate family, their partner, or an organization which employs or is about to employ any of the parties indicated as part of this engagement, has a financial or other interest in or a tangible personal benefit from a supplier considered for a contract.

**THIS COMPLETED FORM MUST BE SUBMITTED WITH AN UD EXCHANGE NON-CATALOG REQUEST AS AN [INTERNAL ATTACHMENT](#)**



Complete the required areas of the form and save the form to your computer.

- |   |  |
|---|--|
| 6. <input type="checkbox"/> <b>Leasing of Space</b>                     | The lease of space, buildings or real estate, as required to conduct the business of the University is not subject to the bid requirements of the procurement policy.  |
| 7. <input type="checkbox"/> <b>Demo Equipment</b>                       | This request is for the purchase of used or demonstration equipment, available at a lower-than-new cost. Provide cost for price of equipment, if purchased as new.   |
| 8. <input type="checkbox"/> <b>Proprietary Hardware / Software</b>      | The requested upgrade to proprietary software or hardware is available only from this supplier, which performs the service only on a direct basis. Attach documentation supporting that the hardware or software is proprietary and that only this supplier can perform the requested upgrade.   |
| 9. <input type="checkbox"/> <b>Equipment Continuity</b>                 | The requesting unit seeks equipment that must be compatible with existing equipment and/or standardizing on equipment which is necessary to assure interchangeability of parts.  |
| 10. <input type="checkbox"/> <b>Pilot Project / Trial / Experiment</b>  | If the department wishes to engage a specific supplier to test or experiment with new equipment or service(s). Selecting this justification requires execution of a product/service trial agreement before start of trial, pilot project or experiment.  |
| 11. <input checked="" type="checkbox"/> <b>Amendment / Change Order</b> | Amendment/Change Order requests not covered under existing contract, where current supplier is best positioned based on skill, knowledge, familiarity with the project to provide the extra work resulting in a cost savings to the unit over the cost of a new supplier. This also includes amendments that result in an extension of the term due to the successor contract or bidding process being incomplete prior to expiration of the current contract. |

### PART III: SUPPORTING NARRATIVE

**SUPPORTING NARRATIVE.** Provide a written narrative explaining why the procurement of the requested goods or services cannot be obtained through either an informal or formal bid process. Attach additional sheets, if necessary.

\*Per [Uniform Guidance](#), if the amount of this request is \$250,000 or greater AND the *Federal Funds* are being used, a price or cost analysis must also be completed and attached. Examples of methods of providing this documentation include: documenting a.) cost analysis efforts; b) market research; c) screenshots, emails, and/or catalog prices; d) price information obtained from peer institutions who have purchased same or similar items; e) prices of similar items.

Our contract with supplier is for painting these buildings but require power washing first. Because of the painting award we were given a steep discount for power washing and the painting work can stay on schedule.



## Requisition • 3552563

Assign Cart

Summary PO Preview Comments Attachments 1 History

User does not have the necessary permissions to view the custom fields associated with this section.

## Accounting Codes

Click **Add** to upload the saved form as an internal attachment to the requisition.

| Program                           | Source                              | Project ID                                  | User Ref        | Cost Share Project |
|-----------------------------------|-------------------------------------|---|-----------------|--------------------|
| OPMNT<br>OPNS & MAINT OF<br>PLANT | 7000000000<br>UNIVERSITY<br>FUNDING | 10000MAIN175336<br>MINOR CAPITAL<br>REPAIRS | <i>no value</i> | <i>no value</i>    |

## Internal Notes and Attachments

Internal Note/Business Justification *no value*  
*Empty*Internal Attachments [Add](#)

## External Notes and Attachments

Note to all Suppliers *no value*Attachments for all suppliers Date [Add](#)[↓ Cassidy 4693976.pdf](#) 7/1/2020PO Clauses 1 [View details](#)Additional Notes to print on PO *no value*

## 2 Items

**CASSIDY PAINTING - 2 Items - 24,650.00 USD**[SUPPLIER DETAILS](#) MAIN : 102 CASSIDY DRIVE, NEWPORT, Delaware 198...

**Draft**

**Be aware of these issues.**  
You may review and proceed.

[Empty: Internal Note/Business Justification](#)

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**Total (24,650.00 USD)**

Subtotal 24,650.00

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**24,650.00**

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**What's next for my order?**

Requisition • 3552563

Assign Cart

- Summary
- PO Preview
- Comments
- Attachments 1
- History

General

Cart Name Cassidy Po  
Description no value  
Priority Normal  
Prepared by Shannon St  
Prepared for Dottie DPS  
Purchasing Business Unit UOD01 UNIVERSITY OF DELAWARE  
eBuilder Process Instance no value  
Multi-Invoice/Payment X  
Technology Request # no value  
Waiver of Bid ✓

If you are a *Shopper* in UD Exchange, Click **Assign Cart** to submit your requisition to a Requester.

If you are a *Requester* in UD Exchange, you will have the option to complete additional information and click a **Place Order** button to submit your requisition or click **Assign Cart** to assign it to another Requester for review.

Expedite X  
Ship Via Best Carrier-Best Way  
Requested Delivery Date no value

Buyer Information

User does not have the necessary permissions to view the custom fields associated with this section.

Accounting Codes

**Draft**

**Be aware of these issues.**  
You may review and proceed.  
Empty: Internal Note/Business Justification

**Total (24,650.00 USD)**

|          |                  |
|----------|------------------|
| Subtotal | 24,650.00        |
|          | <b>24,650.00</b> |

What's next for my order?



## Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

## Resources:

- [Procurement Services Website](#)
- [Preparing a Non-Catalog Request](#)
- [Submitting a Non-Catalog Request](#)

