University of Pittsburgh

Checklist: Requisition and Supporting Documentation Requirements
Other than Federal Grant, Federal Contract or Other Transaction Authorities (OTA) Funding

This checklist details the required documentation and applicable links to information and forms required for the requisition phase. For Federal grant funded requisitions and/or Federal contract or OTA funded requisitions, visit the Purchase, Pay & Travel website to find the correct checklists. Upon receipt of your completed requisition, Purchasing Services will evaluate the information, address any outstanding issues, and (upon agreement of all parties to the transaction) issue the purchase order to the supplier. If you have questions, contact Purchase, Pay & Travel Customer Service.

Sourcing

□ University policy requires the use of University-wide contracted suppliers when available to purchase goods and services.
□ When University-wide contracted suppliers are not available for a particular commodity or service, University purchasers must follow the University's competitive bidding requirements or directed or sole source justification requirements.
□ New supplier instructions. Quotes from applicable University-wide contracted suppliers must be obtained before creating a new supplier.
□ All University units are required to use the PantherExpress System for purchases, through which all purchases are protected by the University's General Terms & Conditions.

Creating a Requisition

□ Select the applicable Standard Form in the PantherExpress System and enter all required information.
□ Enter the requester's name, phone #, and email.
□ Enter the approver's (not the same as requestor) name, phone#, and email **in the "internal notes" section**.
Approver authorization is required for invoices over $10,000.
□ Enter the delivery address: name, phone #, email, and any special delivery instructions (i.e. dock hours, lift gate).
□ Enter the supplier's contact name and phone #, then enter the order distribution fax or email on each line.
□ Enter the distribution account number.

Nonstandard Purchases

□ Software: All software licensing agreements (for any software **not** purchased through Pitt Digital) must be reviewed by Purchasing Services and/or the Office of University Counsel.
□ Restricted Commodities.
□ Biological Specimens/Samples: In accordance with University policy and in order to protect Pitt's intellectual property, when specimen/samples (cells, compounds, DNA) are sent to a supplier for analysis-type service, there is specific information required before a PO is placed. There is a list of frequently used suppliers of these services and their procedures and policies for addressing samples. If your supplier is not listed there, please attach to the requisition: a) what is being shared, b) who owns it, c) what is the deliverable, and d) what happens to the specimen/sample.

Supporting Documentation Requirements

□ All supporting documentation must be attached to the requisition created in the PantherExpress System. Requisitions lacking proper supporting documentation will ***be returned*** to the requesting department.

For All Purchases

□ Attach a valid and current quotation in U.S. dollars from the supplier. You must first obtain quotes from University-wide contracted suppliers

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□ Attach the Certificate of Insurance with required minimums - required for all installation, training, maintenance, or other services performed on University property. The University of Pittsburgh must be named as an "Additional Insured" and as the certificate holder and it must include a waiver of subrogation.
□ Radiation-producing equipment, for example, electron microscopes or cabinet x-ray units, require prior approval by Radiation Safety because the devices have regulatory requirements that must be met upon purchase and/or installation. Please check the "Radioactive" button on your purchase requisition in the PantherExpress System so it will route appropriately for review and approval by the Radiation Safety team.
□ Attach approval from EH&S for purchases containing lasers or laser-related equipment, chemical fume hoods, and gas cabinets.
□ Obtain the IRB approval letter when performing human subject research
□ Attach approval from the Office of Biorisk Management for purchases of biological safety cabinets.
□ Exports: Only for the Natural Sciences Division of the Dietrich School of Arts and Sciences, the Swanson School of Engineering, and the School of Computing and Information: obtain the product's Export Controls Classification. Include it on either the supplier's quote, a separate document, or on the University's Product Classification Certification form. This requirement is needed in order to fully satisfy U.S. export regulations.

Purchases $15,000 or Less

□ Follow applicable steps listed above.

Purchases from $15,000.01 to $75,000

□ If not purchasing from a University-wide contracted supplier, use Request for Quotation (RFQ) template to solicit competitive bids. Submit documentation with your requisition.
□ Follow applicable steps listed above.

Purchases over $75,000

□ If not purchasing from a University-wide Contracted Supplier, contact your Procurement Specialist to issue a Request for Proposal (RFP).
□ Follow applicable steps listed above.
Attach all of the following:
□ installation and site preparation requirements
□ specifications
□ training requirements
□ warranty information
□ delivery schedule
□ maintenance support options
□ testing requirements