

Checklist: Requisition and Supporting Documentation Requirements – Federal Grants

The checklist below is a variation of our [Requisition Checklist](#) to include required documentation and applicable links to important information and forms necessary for the requisition phase when purchasing items with Federal grant funding subject to the [Federal Uniform Guidance](#). Upon receipt of your completed electronic 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 [online](#) or at 412-624-3578.

Sourcing

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#, fax#, and email
- Enter the approver's (not the same as requestor) name, phone#, fax#, and email **in the "internal notes" section**.

Approver authorization is required for invoices over \$5,000.

Enter the delivery address: name, phone#, fax#, 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

New Suppliers: If entering a new supplier, [see instructions](#). Quotes from applicable University-wide [contracted suppliers](#) must be obtained before creating a new supplier.

Software: All software licensing agreements (for any software **not** purchased through CSSD) must be reviewed by Purchasing Services and/or the Office of University Counsel - see [this checklist](#).

Services - see [this checklist](#).

Restricted Commodities - see [this page](#).

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 quotation in U.S. dollars from the supplier. You must first obtain quotes from University-wide contracted suppliers.

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.

Attach [approval from EH&S](#) for purchases containing lasers or laser-related equipment, chemical fume hoods, gas cabinets, and biological safety cabinets.

Exports: Certain schools and departments must 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.

Purchases \$10,000 or Less

Purchases under the Uniform Guidance Micro-Purchase Threshold can be awarded "without soliciting competitive quotations" if the price is reasonable. Follow University purchasing guidelines.

Purchases \$10,000.01 to \$50,000

Use [Request for Quotation \(RFQ\) template](#) to solicit competitive bids. Submit documentation with your requisition.

For sole source purchases, see Non-Competitive Proposals below.

Purchases \$50,000.01 to \$250,000

Contact your [Procurement Specialist](#) for help preparing a Request for Proposal (RFP).

For sole source purchases, see Non-Competitive Proposals below.

Purchases greater than \$250,000

Obtain independent estimates before issuing an RFP.

Contact your [Procurement Specialist](#) for help preparing a RFP.

Publish RFP on the [Purchase, Pay & Travel website](#).

Identify all evaluation criteria and their relative importance.

Solicit from an "adequate" number of qualified sources.

Have a written method for conducting technical evaluations of the proposals and selecting recipients.

Award the contract through price analysis to a responsible firm whose proposal is most advantageous.

For sole source purchases, see Non-Competitive Proposals below.

Non-Competitive Proposals

Submit a completed [directed or sole source justification form](#). Obtain a signature of approval from a dean, department director, or department chair.

Sole source purchases are allowable under the following circumstances:

- Available from only a single source.
- Expressly authorized written permission from the awarding agency.
- Public Exigency.
- Competition is deemed inadequate after RFP

Only [University-wide contracted suppliers](#) marked as "yes" under Uniform Guidance on the table meet the Uniform Guidance competitive bidding requirements.

For purchases over \$250,000, [sole source justification](#) must be accompanied by a cost-analysis.

You may "piggyback" off an existing public contract that was competitively bid.