**Department Requisition Checklist**

Step 1: Determine the type of purchase and applicable business unit to be used.

**Purchase of Goods – Use 00730 and 00783** -> Go to Step 2

Laboratory Analysis without a contract

Movable Equipment Repair without a contract

Promotional Items with the UH logos

Photocopies (replication of existing materials)

Food and Beverage Delivery (as part the food/beverage costs)

Hazardous Materials and Vehicles

Dell/Hied and HP Products

TXMAS Products

WorkQuest (formerly TIBH) Products

Other Purchases of items typically classified as goods

**Purchase of Services (Contracts) – Use CN730 and CN783** -> Go to Step 2

Offset and Digital Printing (non-UH Printing)

Catering

Goods with terms and conditions

WorkQuest (formerly TIBH- TX Industries for the Blind or Handicapped) Services

Professional Services

Leased items or lease contracts

Speaker Agreements

Other purchases of services

**Purchase Under Sponsored Research Contract – Use RC730**

Sponsored research consultant agreements and sub-recipient agreements using fund 5 (except for fund 5999), and any other service agreements paid on a grant cost center, must be processed as RC730 requisitions and routed to OCG, not the Purchasing Department.

Contact DOR for further instruction.

**Purchase – Facilities Planning, and Construction – Use FP730 and FP783**

Contact Facilities Planning and Construction.

Step 2: Go to “Procurement Thresholds” on the Purchasing website (<http://www.uh.edu/office-of-finance/purchasing/Purchasing%20Training/procurement-thresholds>) and determine if a requisition is required. If it is required, proceed with Step 3.

Step 3: Determine the documents needed for your requisition.

**Spot Purchases**

Some purchases which fall into the spot purchase thresholds require requisitions due to regulatory requirements or HUB requirements (see the Thresholds). In such cases, a requisition is needed, but bids/solicitations are not required for the requisition.

**Informal Solicitation** - Purchases that fall into the threshold

A requisition is required. The requisition must have one of the following (check one):

Sole Source - the form must be attached to the requisition (<http://www.uh.edu/administration-finance/purchasing/Forms>).

A quote from a Cooperative vendor. The quote must show the Cooperative’s name and the contract number. The quote must not be expired.

3 quotes from vendors (2 of them must be from HUB vendors). The quotes must not be expired.

**Formal Solicitation** - Purchases that fall into the threshold

A requisition is required. The requisition must have one of the following (check one):

Sole Source - the form must be attached to the requisition (<http://www.uh.edu/administration-finance/purchasing/Forms>).

A quote from a Cooperative vendor. The quote must show the Cooperative’s name and the contract number. The quote must not be expired.

Formal Solicitation Requirements Form (<http://www.uh.edu/office-of-finance/purchasing/Forms>).

Step 4: Determine if the following additional forms are needed for the requisition:

Addendum B (Hazardous Items and Vehicles)

Addendum C (Required for procurements greater than $100,000 and required for contract amendments that increase contract values above originally stated contract values).

Certification of No Boycott Form (If the procurement is $100,000 or greater and paid wholly or partly with state funds OR submit Attestation that no State Funds will be used for the procurement).

Nepotism Disclosure Form (if the procurement is over $1,000,000)

Step 5: See the instructions: “How to create a requisition” (<http://www.uh.edu/office-of-finance/purchasing/Purchasing%20Training>). Follow the instructions and attach the above documents required.