

UH Purchasing Department Buyer's Checklist (rev. 09/2021)

Business Unit: _____ **Purchase Order:** _____

PO Type entered in PeopleSoft

- SPO Spot purchase (Non-Federal under \$15K, Federal under \$10K)
- INFL Informal Bid (Non-Federal \$15-25k, Federal \$10K-249,999; all quotes/bids/tabulation in PO file)

Requires 3 competitive quotes, 2 HUBs must be contacted, if less than 2 explain):

- FRML Formal Solicitation (Non-Federal over \$25k, Federal \$250K and over; RFP/ITB/etc.)

Solicitation ID: _____
- SOLE Sole Source (sole source form in PO file with appropriate justification and signed by requester and certifying signatory)
- EMER EMERGENCY (to prevent a hazard to life, health, safety, welfare, or property or to avoid undue additional cost to the state; requires justification letter from CDA; contracts over \$100k cannot exceed 18mo, no extensions; See MAPP 04.01.01, § 3J for full list of requirements)
- BUYB BuyBoard *co-op
- CHOI Choice Partners *co-op
- DIR Department of Information Resources *co-op
- E&I E&I *co-op
- GRP Group Purchasing *co-op
- NCPA National Co-op Purchasing Alli *co-op
- PRV Provista *co-op
- TCPN TCPN *co-op
- TIBH TIBH (State Use/ WorkQuest) *co-op
- TIPS TIPS *co-op
- TPAS TPASS *co-op
- TXMA TXMAS *co-op
- TXSB TxSmartBuy *co-op
- USCO US Comm *co-op

- AFF Affiliation Agreement
- ART Public Art
- CNL Contract Below Bid Threshold
- DMP Dept Managed Procurement
- HSBF HUB Spot Bid Fair
- ITAA Interagency Agreement
- ITAG Interagency
- LIBR Library Exemption
- TRA Travel Orders
- OTHR Other (explain): _____

- Maintenance agreement
- Lease/Rental agreement
- Master Agreement
- MOU Memorandum of Understanding State of
- Texas Contracts
- Direct Publication
- Blanket Order (approved by comptroller)
- Maintenance agreement
- Lease/rental agreement
- Other *co-op
- Texas Disaster Act of 1975 (must clearly relate to the disaster, conform to the directives of the disaster declaration, and occur within the timeframe specified in the disaster declaration. The procurement file, at a minimum, must contain a copy of the disaster declaration, documentation to support the purchase, receipt of goods or services, and approval of the payment)

*If co-op, enter name and contract number:

***If Cooperative procurement: Quote includes co-op contract number ; Total including all extensions does not exceed \$500k in commodities or \$250k in services ; co-op contract valid and not expired .**

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If Texas Vendor: HUB or Non-HUB ;
if Texas HUB, Vendor name _____ and Gender/Ethnicity _____

Cost center and account

Appropriate account(s) used on PO

Federal funds: (4024, 4026, 4034, 4035, 4036, 5013, 5014, 5015, 5023, 5033, 5034, 5035, 5036, 5043, 5044, 5045, 5046)

HEAF funds: (1008, 1043, 1044, 1045, 1046, 7018, 7021, 7032, 7035, 7042, 7045, 7046, 7047, 7052)

Verify the purchase is for one of the following types of expenditures:

- Land
- Construction or renovation
- Equipment
- Library items
- Tangible personal property Furniture, software, computers, etc.)
- NO ADVANCE PAYMENTS

State-appropriated funds: (1xxx, 7021, 7029, 7035, 7042, 7043, 7044, 7045, 7046, 7047, 7048, 7049, 7050, 7051, 7052, 7054, 7065, 7082)

Verify the purchase is **NOT** for one of the following types of expenditures:

- Auxiliary operations
- Student activities, including commencement
- Alumni activities
- Athletic activities
- Service center operations
- Food or beverage of any kind
- Bottled water
- Greeting cards
- Legal size paper or cabinets
- Plants
- Lobbying activities
- Entertainment

Pre-Approval Form for Requisitions (Addendum B) completed for:

Radioactive/Hazardous Materials

Vehicles

X-Ray Machines

Class 3b and 4 Lasers

Biological Safety Cabinets

For written contracts, verify that vendor is not on warrant hold not earlier than the seventh day before and not later than the date of contract execution.

Verify selected vendor is NOT on the federal and state suspended and debarred vendor list for purchases exceeding \$25,000 regardless of fund source.

SAM

Scrutinized companies with ties to Iran, Sudan & Foreign Terrorist Organization

Companies that Boycott Israel (Required at \$100k)

Purchases exceeding \$100,000 for the full amount of the purchase or the contract with all optional extensions.

Signed Authorization and Information Summary Sheet for Purchase Requisitions Exceeding \$100,000 (Addendum C)

HUB Subcontracting Plan, if appropriate.

Certification of No Boycott of Israel, Energy, and Firearms and Ammunition (If any State funds used)

Certification of No Boycott of Israel, Energy, and Firearms and Ammunition (No State fund used; not required.)

Purchase or Contract \$1 million and more

Verified with Contracts Reporting that the vendor completed form 1295 Certificate of Interested Parties

Certification of Compliance – Texas Public Information Act

Nepotism Form (must be completed by all employees involved in procurement)

Buyer Signature: _____ **Date:** _____