

Purchase Requestor's Checklists

Type of Purchase: Goods and Services	
1	Get quote from supplier
2	Enter requisition in CFS - Get requisition number
3	In Comments section of requisition (Header Comments), enter department contact and supplier contact information
4	Attach ALL documentation in Comments section of requisition, including:
	Quote, proposal, or order form
	If purchase is over \$10,000, complete an over \$10K Purchase Approval Form
	If placing a hospitality/catering Order complete, a Hospitality Approval Form
	If using an outside catering service, obtain approval from Dining Services and Environmental Health and Safety
	All supplier-provided documents: agreements, contracts, order forms, proposals, Statements of Work
	If the goods or service involve the use of the University name or logo, need email approval from Office of Strategic Communication
	If purchasing promotional items, attach written responses to justification questions (see page 3 of this document)
	If placing a furniture installation order, obtain a drawing/layout from supplier
	If placing a membership subscription order, provide justification, explaining how the membership will benefit the University.
	Sole Source Request (<i>if purchase is over \$50,000 - which requires vendor competition - but your department wants to request Sole Source approval on the grounds that no other comparable products or sources can meet the functional needs of the University</i>)
	Unauthorized Purchase Explanation/Certification (UPEC) - complete and attach only when requesting a purchase order to process payment for purchases that were unauthorized by the University.
	Any other supporting documentation that will be helpful to Procurement and Contracts staff
5	Get requisition approved (by your Approving Official) in CFS

Type of Purchase: Information and Communications Technology (ICT)	
1	Get quote from supplier
2	Enter requisition in CFS - Get requisition number
3	In Comments section of requisition (Header Comments), enter department contact and supplier contact information
4	Attach ALL documentation in Comments section of requisition, including:
	Quote, proposal or order form
	If purchase is over \$10,000, complete an over \$10K Purchase Approval Form
	All supplier-provided documents: agreements, contracts, order forms, proposals, Statements of Work
	Email confirmation of approval from Accessible Technology (must submit an ICT Accessibility & Security Review Online Form first)
	If purchase involves cloud service, data sharing and/or storing, you may be asked to complete an Information Security Data Checklist
	Proof of ICT compatibility review and approval from assigned department IT Consultant (an email approval is sufficient)
	If the goods or service involve the use of the University name or logo, need email approval from Office of Strategic Communication
	Sole Source Request (<i>if purchase is over \$50,000 - which requires vendor competition - but your department wants to request Sole Source approval on the grounds that no other comparable products or sources can meet the functional needs of the University</i>)
	Unauthorized Purchase Explanation/Certification (UPEC) - complete and attach only when requesting a purchase order to process payment for purchases that were unauthorized by the University.
	Any other supporting documentation that will be helpful to Procurement and Contracts staff
5	Get requisition approved (by your Approving Official) in CFS

Purchasing Tips – How to Buy:

- Some purchases up to \$50.00 can be made using **petty cash**. For more info: <https://www.csusb.edu/procurement/procedures/purchasing-overview> and <https://www.csusb.edu/accounting/bursar>
- If purchase is under \$1,000, use a **procurement card** (if item or service is permitted; see *Procurement Card User Manual* for a list of restricted and prohibited purchases)
- Office supplies should be purchased through **Staples Advantage**: <https://www.csusb.edu/procurement/forms-documents/staples-advantage-frequently-asked-questions-faq>
- Many purchases can be made through the **Campus Marketplace**, which provides access to CSU contract pricing: <https://www.csusb.edu/procurement/campus-marketplace>
- To purchase **copiers and copier maintenance**, contact Printing Services: printing@csusb.edu
- **Purchase orders** should be created for:
 - Purchases over \$1,000
 - Purchases that involve a supplier coming on to campus to provide service/installation
 - All software and IT services
 - All catering orders

Types of Purchases, Defined:

What are **goods**?

- All types of tangible items: equipment, parts, other merchandise
(Source: <https://csyou.calstate.edu/Policies/icsuam/FinalPDF/Section%205000%20PDF/5202-00.pdf>)

What are **services**?

- Service agreements
- Independent Contractor and Consulting services
- Equipment rental or lease agreements
- Service orders
(Source: <https://csyou.calstate.edu/Policies/icsuam/Pages/5400-00.aspx>)

What is **Information and Communications Technology**?

Equipment, material and/or services used for electronic storage, processing or transmitting of any data or information, as well as the data or information itself. This definition includes but is not limited to electronic mail, voice mail, local databases, externally accessed databases, CDROM, recorded magnetic media, photographs, digitized information, or micro-imaging. This also includes any wire, radio, electromagnetic, photo optical, photo electronic or other facility used in transmitting electronic communications, and any computer facilities or related electronic equipment that electronically stores such communications.

(Source: <https://csyou.calstate.edu/Policies/icsuam/FinalPDF/Section%205000%20PDF/5202-00.pdf>)

- Common Examples of ICT include:
 - Software or operating system (e.g., word processing application, accounting software, authoring and document presentation tools)
 - Desktop or portable computer (e.g., laptops, PCs, PDAs)
 - Electronic office product (e.g., photocopiers, calculators, fax machines, printers)
 - Telecommunication product (e.g., a telephones, cell phones, pagers)
 - Video and multimedia product (e.g., televisions, VCRs, DVD players, videotaped productions)
 - Websites
(Source: <https://www.section508.gov/content/is-it-ict>)

Documentation and Approvals - Where can I find these?

Visit <https://www.csusb.edu/procurement/forms-documents> for the following:

- **Over \$10K Purchase Approval**
- **ICT Accessibility and Security Review Online Form**
- **Information Security Data Requirements Checklist**
- **Unauthorized Purchase Explanation/Certification (UPEC)**
- **Sole Source/Sole Brand Request**
- **VPAT (Voluntary Product Accessibility Template) 2.1** (*Share this template with suppliers when ITS Accessible Technology requests a VPAT for review*)

Where to get other required documentation:

- **ICT Compatibility Review:** Ask your assigned department IT Consultant to review any ICT product or service prior to purchase. Include IT Consultant's approval in comment section of requisition in CFS. For additional information, contact IT Buyer in Procurement and Contracts.
- **Hospitality Expense Approval Form:** https://www.csusb.edu/sites/csusb/files/hospitality_002_0.pdf
- **Dining Services and Environmental Health and Safety Approval** (if using outside caterer):
 - Contact: [Campus Dining Services \(Sodexo\)](#)
 - If Campus Dining Services (Sodexo) is not providing your food, you need approval from Sodexo and [Environmental Health & Safety \(EHS\)](#) department as indicated below:
Campus Dining Services (Sodexo) has exclusive rights to provide food and beverage at campus events. The use of an off-campus source for provision of food and beverage requires written approvals from Campus Dining Services and EHS (Environmental Health and Safety).

To receive EHS approval complete the:

[Food Event Notification \(FEN\) application](#) form two (2) weeks prior to the event and fax to EHS at (909) 537-7049. EHS will process the FEN only if Campus Dining Services has given their initial approval.

NOTE: If food is not being provided by Sodexo and will be served to off-campus attendees, then a Community Event and Temporary Food Facilities Info Packet is needed instead of the FEN: Please be aware there are fees.

(Source: <https://www.csusb.edu/special-events/event-scheduling/procedures/on-campus-procedures>)

- **Office of Strategic Communications Approval:**
 - Contact: logo@csusb.edu
 - Procedures: <https://www.csusb.edu/advancement/strategic-communication/trademarks-promotional-items/guide-buying-csusb>
- **Justification Questions for Promotional Items**
 1. What is the purpose of the requested items? (Promotional, award, gift, give-away, etc.)
 2. To whom in general will the items be distributed? (Existing students, prospective students, donors, staff, visitors, etc.)
 3. At what event or type of events will the items be distributed?
 4. What is the anticipated benefit to the university to be realized through the distribution of the items?
(Source: <https://www.csusb.edu/procurement/procedures/special-requirements>)