**Department Requisition Checklist**

Step 1: Determine the type of purchases 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 (by selecting an OCG buyer), not purchasing.

Contact DOR for further instruction.

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

 Contact Facilities 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 find out 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 falls into the spot purchase thresholds require requisitions due to regulatory requirements or HUB requirements (see the matrix). In such cases, a requisition is needed, but no bids/solicitations are 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 that the vendor is a Cooperative member, and indicate type of Cooperative (e.g., Buyboard, Choice Partner, E&I, etc.). 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 that the vendor is a Cooperative member, and indicate type of Cooperative (e.g., Buyboard, Choice Partner, E&I, etc.). The quote must not be expired.

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

Step 4: Check to see if the following additional forms are needed for the requisition:

 Addendum B (Hazardous Items and Vehicles)

 Addendum C (if the procurement is over $100,000)

Certification of No Boycott Israel Form (if the procurement is over $100,000 and paid wholly or partly with state funds)

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

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