

Checklist for Purchasing Goods and Services

This list represents information that will be necessary to promptly purchase goods or services with ARRA stimulus money.

Select the appropriate side of the checklist by determining what type of a purchase you're doing:

- **DIRECT BUY** – purchase under \$3,300 does not require any documentation
- **SOLE SOURCE** – purchase over \$3,300 where only a single supplier provides the necessary product/service
- **COMPETITIVE PURCHASE** – purchase over \$3,300 where many suppliers/distributors are available

SOLE SOURCE PURCHASE	COMPETITIVE PURCHASE
<p><input type="checkbox"/> Sole Source Justification (please see link for directions http://www.washington.edu/admin/purchstores/docs/SoleSource.v1.docx)</p> <p><input type="checkbox"/> Quotation</p> <ul style="list-style-type: none"> • All items on requisition should be in the quote • Right price (including discounts, trade-ins, etc.) • Right supplier information (address and contact information) • Unexpired quote (Recommended to get a quote valid for 270 days, if submitting a grant/contract proposal or 90 days in the post-award stage; Purchasing needs at least 5 days prior to quote expiration) • Payment terms (University may not pay in advance in most cases; alternate terms may be negotiated) • Warranty/Extended Warranty (if equipment) <p><input type="checkbox"/> Delivery/Performance Completion requirements</p> <ul style="list-style-type: none"> • Delivery date should be realistic (coordinated with suppliers ability to deliver and with time allocated for the order placement process) • Service dates should be entered in the system (PAS), if it is a service contract <ul style="list-style-type: none"> ○ In General Comments note if this is a new service or continuation of such (for latter include Preceding PO) • Any special requirements: <ul style="list-style-type: none"> ○ Time constraints ○ Need for a forklift, loading dock restrictions, site inspection ○ Inside delivery ○ Etc. <p><input type="checkbox"/> Tax exemption</p> <ul style="list-style-type: none"> • Object and sub-object codes must reflect tax exemption, if applicable • Extended warranty may be tax exempt, if bought at the same time as equipment 	<p><input type="checkbox"/> Specifications</p> <ul style="list-style-type: none"> • Supply with specification of the product <ul style="list-style-type: none"> ○ Specific attributes ○ Quality requirements ○ Etc. <p><input type="checkbox"/> Quotations (preferably 3 quotes), if you don't have the quote Purchasing we will acquire them. Note: Competitive orders over \$46,200 are required to undergo a formal bid process conducted by Purchasing.</p> <ul style="list-style-type: none"> • All items on requisition should be in the quotes • Price (including discounts, trade-ins, etc.) • Supplier information (address and contact information) • Unexpired quotes (recommended to get a quote valid for 90 days) • Payment terms (University may not pay in advance in most cases) • Warranty (if equipment) <p><input type="checkbox"/> Delivery/Performance Completion requirements</p> <ul style="list-style-type: none"> • Delivery date should be realistic (coordinated with suppliers ability to deliver and with time allocated for the order placement process) • Service dates should be imputed in the system (PAS), if it is a service contract <ul style="list-style-type: none"> ○ In General Comments note if this is a new service or continuation of such (for latter include Preceding PO) • Any special requirements: <ul style="list-style-type: none"> ○ Time constraints ○ Need for a forklift, loading dock restrictions, site inspection ○ Inside delivery ○ Etc. <p><input type="checkbox"/> Tax exemption</p> <ul style="list-style-type: none"> • Object and sub-object codes must reflect tax exemption, if applicable • Extended warranty may be tax exempt, if bought at the same time as equipment

For additional information and forms visit our web site: <http://www.washington.edu/admin/purchstores/docs>
For **contact information** please see: <http://www.washington.edu/admin/purchstores/buyers>