

Procurement Quick Reference Guide

Step one: What Are You Buying?



Goods

OR

Services

If it's in an ePro catalog:

Use the catalog (all dollar ranges)

If it's NOT in a Catalog:

Under \$15K

- Is PCard Allowed? *

OR

Requisition for Goods (non-catalog)

\$15K–\$100K

- Requisition for Goods (non-catalog)
+
Informal Quote Summary (IQS)

Over \$100K

- Requisition for Goods (non-catalog)
+
Procurement Method

Do I Need A Purchase Order? **

Under \$15K

- Is PCard Allowed? *

OR

Requisition for Services (non-catalog)

\$15K–\$100K

- Requisition for Services (non-catalog)
+
Informal Quote Summary (IQS)

Over \$100K

- Requisition for Services (non-catalog)
+
Procurement Method

Step two: Does It Involve A non-catalog Purchase?

If yes, you need two things:

Submit a Sourcing Request

Piggyback on Existing Award

OR

Do a Request for Proposal (RFP)

Contract

Purchase Order (PO) as Contract

OR

Quick Contract Form

OR

Full Contract Review

● Where do I start?

- Choose your path:

- PCard (if eligible) 🏹
- Catalog Requisition (ePro supplier) 🚶
- Non-Catalog Requisition (not in catalog) 🏹

● Fastest way to buy?

- PCard
- Catalog Requisition
- Non-Catalog Requisition
- * Non-catalog purchases follow dollar thresholds

● What are dollar thresholds?

- Dollar amounts that determine how you can select your vendor
- * 0-\$15k Department Discretion
- * 15-100k - Informal Quote Summary (IQS)
- * > \$100k - Formal Solicitation

● What is a non-catalog purchase?

- Anything not in an ePro catalog
- * Start with a requisition

● Procurement method

- Required to document vendor selection
 - \$15 - \$100k: IQS
- > \$100K (choose one):
 - Existing Award (preferred / fastest)
 - RFP / Bid

● When can I use a PCard?

- Use for eligible purchases only
- Some items are restricted
- * See PCard Restricted List up to your PCard credit limit
- * If restricted, use a requisition

● Do I need a PO?

- Requisition = PO (system-generated)
- No PO required:
 - PCard
 - Payment Request

● Do I need a contract?

- Depends on complexity & vendor requirements
 - PO – includes standard terms and often serves as the contract 🏹
 - Quick Contract 🚶
 - Full Contract Review 🏹

● New vendor setup

- Required before purchase
 - IRS tax verification
 - Banking validation
- See Vendor Setup in Connect

● How are thresholds calculated?

- Based on total purchase value
- * Includes full contract term, not just first payment

● How do I arrange travel?

- Travel Training

Need Help?

- Procurement
 - * 940-369-5500
 - * Procurement Page