



CHECKLIST: REQUISITION and SUPPORTING DOCUMENTATION REQUIREMENTS

To expedite the requisition process, all requisitions and all required supporting documentation must be submitted electronically to Purchasing Services via PRISM. Upon receipt of electronic requisition and attached supporting documents, Purchasing Services will evaluate the information, address any outstanding issues, and upon agreement of all parties to the transaction, issue the Purchase Order to Supplier.

To ensure that all requisitions are processed as expeditiously as possible, requisitions submitted on paper or lacking proper electronic supporting attachments will be returned to the requesting department.

SOURCING

If product is not available from a University-wide [Contracted Supplier](#), a University of Pittsburgh purchase order generated through PRISM is required. PRISM purchase orders carry the University's standard contractual terms and conditions. If order is for \$5000.00 or more, an electronic requisition must be submitted to Purchasing Services via PRISM.

ELECTRONIC PRISM REQUISITION

Required Information

- Requester:
 - Requester Name
 - Phone, FAX, E-mail
- Complete Delivery Address
 - Contact Name
 - Phone, FAX, E-mail
- Complete Description:
 - Quantity
 - Pricing (US Dollars)
 - UOM (Unit of Measure)
- Distribution Account Number
- Shipping Terms-FOB Destination

'Notes to Buyer' in PRISM

- Invoice Approver (not same as Requester)
 - Approver Name
 - Phone, FAX, E-mail (required)

Second Signature (invoice approver authorization) is required for all invoices over \$5000.

- Complete Supplier Information
 - Contact Name
 - Phone, FAX, E-mail

If new supplier or updating supplier information, supplier must complete [Supplier Verification Form](#)

NON-STANDARD PURCHASES

Software: All software license agreements must be reviewed by Purchasing Services and/or Office of General Counsel unless purchased from CSSD

See: [Software License Agreement Checklist](#):

Services: If requisition is for *services*,

See: [Checklist for Professional Services Agreement](#)

Restricted Commodities:

See: [FAQ-Specialized Purchases](#)

SUPPORTING DOCUMENTATION

Contact the assigned Purchasing Services Sr. Buyer if questions regarding your electronic requisition

All supporting documentation must be attached when requisition is created in PRISM: **Step-by-Step Instructions:** [Attaching Supporting Documents to PRISM Requisition](#)

*** Reference requisition # on all supporting documents

Requisitions lacking proper supporting documentation **will be returned** to the requesting department.

FOR ALL PURCHASES

- Valid, Current Quotation from supplier
 - Must first obtain quotes from Contracted Suppliers
 - Include trade-in information, if applicable
- [Certificate of Insurance](#)
 - Required for installation, training, or other services performed on University property
 - **The University of Pittsburgh of the Commonwealth System of Higher Education must be named as an 'Additional Insured'**

FOR PURCHASES OVER \$5000

- [Directed or Sole Source Justification Form](#)
 - [3-D signature required](#) - See FAQ for more info
 - Not required for Contracted Supplier
- [Equipment Screening Certificate](#)
 - Required **only** for **05**-accounts using a Federal grant to purchase a **single** piece of equipment valued at \$5,000.00 or more.
 - [3-D signature required](#) - See FAQ for more info
 - **If over \$25,000** - Research & Cost Accounting signatures required

FOR PURCHASES OVER \$50,000 ADDITIONAL DOCUMENTATION REQUIRED

- Detailed Specifications**
 - Installation requirements
 - Site Preparation
 - Technical Specifications
 - Training
 - Warranty Information
 - Delivery Schedule
 - Maintenance Support Options
 - Acceptance Testing Requirements