Requisition Approvals

Approval Matrix

<table>
<thead>
<tr>
<th>Standard Goods and Services Requisitions</th>
<th>Approver</th>
<th>Approval Routing Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Value</td>
<td>Approver</td>
<td>Approval Routing Order</td>
</tr>
<tr>
<td>$&lt; 100</td>
<td>Auto-approve</td>
<td>N/A</td>
</tr>
<tr>
<td>$100+ per line</td>
<td>DeptID PO Approver 1</td>
<td>Parallel</td>
</tr>
<tr>
<td>$10,000+ per line</td>
<td>DeptID PO Approver 2</td>
<td>Parallel</td>
</tr>
<tr>
<td>Sponsored activity – $1,000+ or</td>
<td>DeptID Certified Approver</td>
<td>Parallel</td>
</tr>
<tr>
<td>contains a travel-related account code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7206xx) for any amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$50,000+</td>
<td>Central Purchasing Services approver</td>
<td>Serial (routes to Purchasing Services last)</td>
</tr>
<tr>
<td>$25,000+ and paid by a federally</td>
<td>Central Purchasing Services approver</td>
<td>Serial (routes to Purchasing Services last)</td>
</tr>
<tr>
<td>sponsored contract</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept. of Env. Health &amp; Safety: $100+</td>
<td>Central Purchasing Services approver</td>
<td>Serial (routes to Purchasing Services last)</td>
</tr>
<tr>
<td>and uses account 720202 (restricted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>chemicals)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Professional Services Requisitions</th>
<th>Approvals (cumulative)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Types</td>
<td></td>
</tr>
<tr>
<td>&lt;$100</td>
<td>Auto-approve</td>
</tr>
<tr>
<td>$100+ per line</td>
<td>DeptID Approver 1</td>
</tr>
<tr>
<td>$10,000+ per line</td>
<td>DeptID Approver 2</td>
</tr>
<tr>
<td>Sponsored activity $1,000+</td>
<td>Certified Approver</td>
</tr>
<tr>
<td>$25,000+ if purchase paid by a federally sponsored contract</td>
<td>Purchasing Services</td>
</tr>
<tr>
<td>$50,000+</td>
<td>Purchasing Services</td>
</tr>
<tr>
<td>All foreign suppliers</td>
<td>Payroll Services</td>
</tr>
<tr>
<td>All individual/sole proprietor types of suppliers</td>
<td>Controller’s Office</td>
</tr>
<tr>
<td>Legal services</td>
<td>Office of the General Counsel (offline process)</td>
</tr>
<tr>
<td>Audit services</td>
<td>Controller’s Office</td>
</tr>
<tr>
<td>Architecture, design and engineering</td>
<td>Capital Planning and Project Management</td>
</tr>
</tbody>
</table>

For all requisitions of $1,000,000 and higher, additional offline approvals by the Board of Regents (and SPA if a sponsored project is involved) are required. Purchasing Services will assist departments in getting these offline approvals.
The following lists define the approval requirements and considerations for each type of requisition.

**General Purchase Order**
- Justification is complete
- Supplier is correct
- Category is correct for all items
- Items, quantities, and prices are correct
- Comments are entered, if needed
- Ship-to location is correct
- DeptID and ChartField string are complete and correct
- Completed Price and Supplier Justification Form is attached for requisitions valued between $10,000 and $49,999
- Complies with all University policies
- Appropriate U-Wide Contract is referenced, if applicable
- Purchase is allowable for the budget

**Blanket Order**
- Justification is complete
- Supplier is correct
- Item(s) are correct
- Quantity is 1 and unit of measure is "LOT"
- Dollar amount is correct
- Comments are entered, if needed
- Start and end dates are correct
- Ship-to location is correct
- DeptID and ChartField string are complete and correct
- Completed Price and Supplier Justification Form is attached for requisitions valued between $10,000 and $49,999
- Appropriate U-Wide Contract is referenced, if applicable
- Complies with all University policies
- Purchase is allowable for the budget

**Contract for Professional Services (CPS)**
- Justification is complete
- Supplier is correct
- Category is correct
- Items, quantities, and prices are correct
- Comments are entered, if needed
- Contract start date is correct
- Ship-to location is correct
- DeptID and ChartField string are complete and correct
- All required forms (including completed Statement of Work (SOW) and Professional Services Information Sheet) are attached
- Complies with all University policies
- Appropriate U-Wide Contract is referenced, if necessary
- Purchase is allowable for the budget

**Performance Contract for Professional Services (PCPS)**
- Justification is complete
- Supplier is correct
- Category is correct
- Items, quantities, and prices are correct
- Comments are entered, if needed
- Contract start date is correct
- Ship-to location is correct
- DeptID and ChartField string are complete and correct
- All required forms (including completed Professional Services Information Sheet and completed Performance Agreement) are attached
- Complies with all University policies
- Appropriate U-Wide Contract is referenced, if necessary
- Purchase is allowable for the budget

**Quick Contract for Professional Services (QCPS)**
- Justification is complete
- Supplier is correct
- Category is correct
- Items, quantities, and prices are correct
- Comments are entered, if needed
- Contract start date is correct
- Ship-to location is correct
- DeptID and ChartField string are complete and correct
- All required forms (including completed Statement of Work (SOW) and Professional Services Information Sheet) are attached
- Complies with all University policies
- Appropriate U-Wide Contract is referenced, if necessary
- Purchase is allowable for the budget
Attachment Requirements for Requisitions

A. Professional Services Contracts

All QCPS, PCPS, and CPS contracts

1. A completed Professional Services Information Sheet (PSIS) must be attached to ALL requisitions for QCPS, PCPS, and CPS contracts that total $3,000 or greater, OR on any sponsored contract for any dollar amount.

2. A Statement of Work (SOW) must either be included in the justification or attached to all requisitions for QCPS, PCPS, and CPS contracts. There is no set form for this, but samples are available on the Purchasing Services website.

All PCPS contracts

1. A completed Performance Agreement must be attached to all PCPS contracts.

All CPS, QCPS, or PCPS contracts with a foreign national supplier

1. A completed Nonresident Alien Data Collection Sheet must be attached to all contracts with a foreign supplier.

B. Goods and Standard Services $10,000 and Over

<table>
<thead>
<tr>
<th>Requisition Value</th>
<th>$10,000</th>
<th>$50,000</th>
<th>$250,000+</th>
</tr>
</thead>
<tbody>
<tr>
<td>All purchases of goods and standard services</td>
<td>A completed Price and Supplier Justification Form must be attached to requisitions valued between $10,000 and $49,999.</td>
<td>If requisition item is only available from a single source supplier, a Request for Exception to Regents Policy Form must be completed and approved by Purchasing Services prior to placing order.</td>
<td>U-Wide contract purchases over $250,000 must go through the bidding process.</td>
</tr>
</tbody>
</table>