



**UC SANTA BARBARA
DEPARTMENT PURCHASE REQUISITION CHECKLIST**

Form J

Gateway PR #	Prepared By
Supplier	Dollar Amount

Yes No	Is the quote and supporting documentation attached? Note: quotes are required on federal funding over \$9,999.99, restricted commodities, and orders over \$10k
Yes No	Is the total of the acquisition, before tax, over \$99,999.99? If Yes: Contact Purchasing to determine if a bid is required. Do not advance the requisition.
Yes No	Is the purchase being shipped internationally, or does the quote specify the goods are subject to Export Control, ITAR, or EAR? http://www.research.ucsb.edu/compliance/export-control/frequently-asked-questions/ If Yes: Use the dropdown on the requisition under Additional Order Details to Ad-Hoc in Export Control.
Yes No	Are the Commodity Code and Object Code correct? Do not leave the default "Spot Buy Products" on Commodity Code "00". Check and correct code(s) as needed. https://www.bfs.ucsb.edu/object-codes
Yes No	Is this order Inventorial Equipment? If Yes: Use the dropdown for Inventorial Equipment, and ensure the object code is in the 9000 series so the requisition routes to Equipment Management
Yes No	Will the UC name (any UC derivative) or logo be used on tangible goods? (printing for ads, letterhead, business cards, etc. not applicable) If Yes: Route to Campus Purchasing using the drop-down for Restricted Commodities. The vendor will need to be registered with Carol Cox at the bookstore to use our Name/Logo.
Yes No	If Inventorial Equipment, will it be used for research more than 50% of the time? If Yes: The purchase may qualify for a Partial Tax Exemption. Be sure to use the below PDF form, attach it externally to the GW requisition, and reduce the sales tax on the requisition to 3.813%. https://www.cdtfa.ca.gov/formspubs/cdtfa230m.pdf
Yes No	Is this a Vendor Blanket? If Yes: Ensure the description is a full paragraph, with a period of coverage of 1 year or less. (Note: if a formal bid was awarded, the period of coverage may be entered through the end of the award.)
Yes No	Is the product coming from outside the US? If Yes: Click the Restricted Dropdown, and select "International Purchases". Check this website (http://www.bfs.ucsb.edu/procurement/goods-and-services) for more information on international orders and Customs Brokers. Note: If the vendor is paying for the shipping entirely, you will not be invoiced from our Customs Broker, but if the vendor is charging you for shipping costs, our Customs Broker must be used.
Yes No	Is this a Restricted Commodity? www.bfs.ucsb.edu/files/docs/procurement/Restricted%20Items%20List%20-%20Sept%202018.docx If Yes: Use the drop-down for Restricted Commodity to select the correct item for routing.
Yes No	Is the funding Federal, and the dollar amount is over \$9,999? If yes: Analyze the completed and attached Form A . Does it make sense? Work with the end user to ensure the Form is completed correctly <u>before</u> submitting to Procurement.

Tips for submitting a successful federal purchase using Form A:

- Utilize Price Analysis wherever possible; competition should be sought with all federal orders, and **will speed up the process of your order.**
- If at all possible, use a [UCOP Agreement](#) vendor; using contract pricing will also speed up your order.
- If using a Sole Source, be sure to answer the question completely. We are looking for specific features or parameters to explain **why this is the only vendor that can provide the purchase.**
- The Price Reasonableness section is required. The answer to this question lets the **Government know their money is being spent wisely.** If this is a sole source, explain how you know it's a good price. If the vendor provided an Educational or other discount, add it to the commentary.