



# UNIVERSITY OF PITTSBURGH FINANCIAL OPERATIONS

**PURCHASING SERVICES /  
SUPPLIER MANAGEMENT**  
3328 CL  
Pittsburgh, PA 15260  
(412) 624-6648 (P)  
(412) 624-9339 (Fax)

**PAYMENT PROCESSING**  
3000 CL  
Pittsburgh, PA 15260  
(412) 624-4004 (P)  
(412) 624-2223 (Fax)

**PAYROLL**  
207P Craig Hall  
Pittsburgh, PA 15260  
(412) 624-7225 (P)  
(412) 624-8072 (Fax)

**FINANCIAL RECORDS SVC**  
3000 CL  
Pittsburgh, PA 15260  
(412) 624-0313 (P)  
(412) 624-2446 (Fax)

## Purchasing Services

Purchase orders often require the collaboration and coordination of the end user, supplier, and buyer to address the varied issues that can arise during the purchasing process. Below is a CHECKLIST of required documentation that will help expedite the purchase requisition process. Upon receipt of a completed purchase requisition package, Purchasing Services will evaluate the information, address any outstanding issues, and upon agreement of all parties to the transaction, issue the purchase order to the supplier.

**Note:** For details regarding requisition requirements and procedures or for a copy of the University of Pittsburgh [Terms & Conditions](#), access the web site at [www.bc.pitt.edu/purchasing](http://www.bc.pitt.edu/purchasing) or call Purchasing Services at 412-624-6648.

| <b>CHECKLIST for PURCHASING REQUISITION PACKAGE REQUIREMENTS</b>   |   |
|--|---|
| <b>FOR ALL PURCHASES</b>   | <b>FOR PURCHASES OVER \$5000<br/>ADDITIONAL DOCUMENTATION REQUIRED</b>  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Completed Requisition (electronic or paper)               <ul style="list-style-type: none"> <li><input type="checkbox"/> Distribution Account Number</li> <li><input type="checkbox"/> Signatures (electronic signatures)                   <ul style="list-style-type: none"> <li>o Requester                       <ul style="list-style-type: none"> <li>▪ Contact Name</li> <li>▪ Phone</li> <li>▪ Fax</li> <li>▪ E-mail</li> </ul> </li> <li>o Approver* (not same as Requester)                       <ul style="list-style-type: none"> <li>▪ Contact Name (Invoice Approver)</li> <li>▪ Phone</li> <li>▪ Fax</li> <li>▪ E-mail (very important)</li> </ul> </li> </ul> </li> <li><input type="checkbox"/> Complete Delivery Address                   <ul style="list-style-type: none"> <li>o Contact Name</li> <li>o Phone</li> <li>o Fax</li> <li>o E-mail</li> </ul> </li> <li><input type="checkbox"/> Complete Supplier Information                   <ul style="list-style-type: none"> <li>o Contact Name</li> <li>o Phone</li> <li>o Fax</li> <li>o E-mail</li> </ul> </li> </ul> <p style="margin-left: 20px;"><b>Note:</b> If new Supplier, please complete <a href="#">Supplier Verification Form</a>.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Valid Quotation (include trade-in information)</li> <li><input type="checkbox"/> Shipping Terms-FOB Destination</li> <li><input type="checkbox"/> Software License Review (only for software purchases not from CSSD)**</li> <li><input type="checkbox"/> Certificate of Insurance               <ul style="list-style-type: none"> <li>o Required for any installation or other services to be performed on University property</li> </ul> </li> </ul> </li></ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Equipment Screening Certificate</a>***               <ul style="list-style-type: none"> <li>o Required <b>only</b> for 05-accounts using a Federal grant to purchase a single piece of equipment valued at \$5000 or more.</li> <li>o 3-D signature required                   <ul style="list-style-type: none"> <li>▪ If over \$25,000 - requires Research Accounting signatures.</li> </ul> </li> </ul> </li> <li><input type="checkbox"/> <a href="#">Directed or Sole Source Justification Form</a><br/>(Not required for purchases from <a href="#">Contracted Suppliers</a>)</li> </ul> <p><b>Note:</b> * Invoice Authorization Approval is required for all invoices over \$5000.00.<br/>** All Software License Agreements (SLA) require review by Purchasing Services and/or Office of General Counsel<br/>o Obtain SLA from supplier and forward to Purchasing Services<br/>*** Obtain <a href="#">Equipment Screening Certificate</a></p> |
|  | <b>FOR PURCHASES OVER \$50,000<br/>ADDITIONAL DOCUMENTATION REQUIRED</b>  |
|  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Detailed Specifications               <ul style="list-style-type: none"> <li><input type="checkbox"/> Technical Specifications</li> <li><input type="checkbox"/> Installation                   <ul style="list-style-type: none"> <li>o Site Preparation</li> </ul> </li> <li><input type="checkbox"/> Training</li> <li><input type="checkbox"/> Warranty Information</li> <li><input type="checkbox"/> Delivery Schedule</li> <li><input type="checkbox"/> Maintenance Support Options</li> <li><input type="checkbox"/> Acceptance Testing Requirements</li> </ul> </li> </ul>  |
| <b>Please fax all supporting documentation for electronic requisitions to 412-624-8435 or send to 3328 CL. Be sure to reference requisition number on all documents.</b>   |   |