



# Checklist: Requisition and Supporting Documentation Requirements – Not Federal Grants

The checklist below will help you keep track of required documentation and applicable links to important information and forms required for the requisition phase. Upon receipt of your completed electronic requisition, PantherExpress 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. If you have questions, contact PantherExpress Customer Service at 412-624-3578 or submit an [online inquiry](#). For the Federal grant funding version of this checklist, [click here](#).

## Sourcing

- University policy requires the use of University-wide [contracted suppliers](#) when available to purchase goods and services.
- When University-wide contracted suppliers are not available for a particular commodity or service, University purchasers must follow the University’s [competitive bidding](#) requirements or directed or [sole source justification](#) requirements.
- All University units are required to use the PantherExpress System for purchases, through which all purchases are protected by the University’s General [Terms & Conditions](#).

## Creating a Requisition

- Select the applicable Standard Form in the PantherExpress System and enter all required information.
  - Enter the requester’s name, phone#, fax#, and email
  - Enter the approver’s (not the same as requestor) name, phone#, fax#, and email **in the “internal notes” section**.

*Approver authorization is required for invoices over \$5,000.*

- Enter the delivery address: name, phone#, fax#, email, and any special delivery instructions (i.e. dock hours, lift gate).
- Enter the supplier’s contact name and phone#, then enter the order distribution fax or email on each line.
- Enter the distribution account number.

## Nonstandard Purchases

- New Suppliers: If entering a new supplier, [see instructions](#). Quotes from applicable University-wide [contracted suppliers](#) must be obtained before creating a new supplier.
- Software: All software licensing agreements (for any software **not** purchased through CSSD) must be reviewed by Purchasing Services and/or the Office of University Counsel - see [this checklist](#).
- Services - see [this checklist](#).
- Restricted Commodities - see [this page](#).

## Supporting Documentation Requirements

- All supporting documentation must be attached to the requisition created in the PantherExpress System. Requisitions lacking proper supporting documentation will *be returned* to the requesting department.

### For All Purchases

- Attach a valid and current quotation in U.S. dollars from the supplier. You must first obtain quotes from University-wide contracted suppliers.
- Attach the [Certificate of Insurance](#) with required minimums - required for all installation, training, maintenance, or other services performed on University property. The University of Pittsburgh must be named as an “Additional Insured” and as the certificate holder.
- Attach [approval from EH&S](#) for purchases containing lasers or laser-related equipment, chemical fume hoods, gas cabinets, and biological safety cabinets.

### For Purchases over \$10,000

- Attach a completed [directed or sole source justification form](#) if the supplier is **not** a University-wide contracted supplier.
  - Obtain a signature of approval from a dean, department director, or department chair.
- Only** for the Natural Sciences Division of the Dietrich School of Arts and Sciences, the Swanson School of Engineering, and the School of Computing and Information: obtain the product’s [Export Controls Classification](#). Include it on either the supplier’s quote, a separate document, or on the University’s [Product Classification Certification](#) form. This requirement is needed in order to fully satisfy U.S. export regulations.

### For Purchases over \$50,000

- Attach all of the following:
- installation and site preparation requirements;
  - specifications;
  - training requirements;
  - warranty information;
  - delivery schedule;
  - maintenance support options; and
  - testing requirements.