Purchasing Decision Documentation

The Purchasing Decision Documentation must be completed for purchases $25,000 or more and attached to your Requisition. You will be asked a series of questions that must be answered regarding the type of purchase and process used for making your supplier selection. Once you have completed answering the questions, a Bid Summary or Sole Source Justification Form will be created based on your answers.

- **Bid Summary Form** – The product or service needed can be provided by multiple suppliers resulting in the need to acquire multiple bids/quotes.
- **Sole Source Justification Form** – The product or service needed can only be provided by a single supplier and the purchase should be exempt from the competitive bid process.

How to Access the Form

1. The Purchasing Decision Documentation can be accessed from the PPS website under Policies and Forms. You will be prompted to sign in with your NetID and password, once you select the Purchasing Justification Form link.

Completing the Purchasing Decision Documentation

2. Once logged in, you will be required to fill in fields with a red asterisk. All grayed out fields are auto filled and cannot be edited.

3. You will need to answer the required questions under the Uniform Guidance and Procurement Standards section in order to move to the next section on the form. **If you are using sponsored funds and your purchase is $250,000 or more, Procurement and Payment Services should have been engaged to assist with your purchase. Note: If your purchase falls into this scenario and you did not engage Procurement and Payment Services, you will receive an error message and not be able to complete the form. To learn more, visit the Uniform Guidance Procurement Standards webpage.**
COMPETITIVE BID SCENARIO – MORE THAN ONE BID OBTAINED - BID SUMMARY

1. If you have obtained more than one bid, select ‘Yes’ for the question asking if you received more than one bid.

2. Service/Product Details Section – Enter a detailed description of the service or product select all applicable primary factors in selecting the supplier awarded the bid.
3. **Competitive Bids Entry Section** – Enter the supplier name and total price for all bid responses received.
   - Two (2) quotes are required but Procurement and Payment Services recommends to obtain a minimum of three (3). You will be prompted to enter two quotes; if you have more than three quotes, click the Add button to add additional fields.
   - After all quotes have been entered, continue by selecting the ‘Next’ button.

![Image of Competitive Bids Entry Section]

4. **Conflict of Interest Section** – When completing the Conflict of Interest section, responses should be made according to the individual who selected the supplier. Note that any ‘Yes’ responses will require an explanation to be entered in the comment field.

![Image of Conflict of Interest Section]

**NON-COMPETITIVE BID SCENARIO–SINGLE BID OBTAINED – SOLE SOURCE JUSTIFICATION**

1. If you received one (1) bid and only one supplier can provide the product or service, select ‘No’ for the question asking if you have more than one bid and select ‘Yes’ confirming the product or service can only be provided by a single supplier.
2. **Service/Product Details Section** – Enter a detailed description of the product or service and select all applicable primary factors that assisted you in your supplier selection.

3. **Noncompetitive Purchase Justification** – Select all conditions that are relevant as to the reason a competitive bid process was not appropriate for the product or service. For every condition selected, you will be required to provide an explanation. After selecting all relevant conditions and providing an explanation, continue by clicking the ‘Next’ button.
4. **Conflict of Interest Section** – When completing the Conflict of Interest section, responses should be made according to the individual who selected the supplier. Note that any ‘Yes’ responses will require an explanation to be entered in the comment field.

### SUBMITTING THE FORM

1. Before submitting the form, be sure to review all information and make sure responses are accurate.
2. When you are ready to process your form, click the Submit button.
3. As the submitter of the form, you will receive an automated email with a PDF copy of the Purchasing Decision Documentation as a Bid Summary or Sole Source Justification Form.

**Note:**

- Your Purchasing Decision Documentation will not be saved. You will not be able to retrieve the original document to make modifications.
- If you have a PDF editor (e.g. Adobe Acrobat) installed on your computer, you can make edits to the text on your PDF copy. If any other modifications are needed, a new Purchasing Decision Documentation will need to be submitted.