## **Purchasing Checklist**

	Avai	vailable Purchasing Methods		
1	a b		Low-Value Order (LVO) c ☐ Purcha Commodity Agreement d ☐ Pro Ca	se Order rd
		*Refer to the Business Office's "Purchasing Options Reference Guide" for details and restrictions on each purchasing method **Separate guidelines apply for travel and entertainment expenses. Please refer to the Business Office's "Travel Policy Reference Guide".		
	ALL of the following MUST be provided to the Business Office for initial requests to purchase goods or services			
2	е	e Completed Universal Form		
	f		Any additional supporting materials for the purchase (e.g. vendor quote)	
	g		☐ Vendor set-up documents	
			-Vendors who have not transacted with the University before must be established in the accounts payables system.	
			Department unit should obtain the following vendor documents and forward to the Business Office:	
			1) W-9 form signed by vendor AND	
		2) Current certificate of insurance		
3	-	he following additional documentation MUST be provided when <u>purchasing services</u>		
	h	Ш	Vendor proposal -Total amount to be charged	-Period of performance
			-Itemization of how the total amount was computed	-Scope of work
			-Detailed description of the services to be provided	-Location of where services will be rendered
	i		Services to be provided by an independent contractor or consultant must also provide:	
	•	Ш	-Pre-hire worksheet <sup>1</sup>	-Sole source request form (if applicable) <sup>1</sup>
			-Independent contractor/consultant form <sup>1</sup>	-Current CV
			-Insurance certificate <sup>2</sup>	-IRB approval (if human subjects are involved)
				-ind approval (ii fluttiati subjects are involved)
		<sup>1</sup> Forms can be located at www.purchasing.ucla.edu <sup>2</sup> For insurance requirements or details on insurance waivers, please contact your Business Office fund manager		
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4	Plea j	se no	se note the following general responsibilities of the department unit  Do NOT sign any contracts or terms & conditions	
	,	Ш	-The UCLA Purchasing Department has sole responsibility and authority to sign all agreements	
		Purchase requests are submitted in a timely manner -Additional time is required for requests that require <u>prior</u> approval by the UCLA Purchasing Department (approx. 3-6		
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			Goods or services are requested from the vendor -If available, department units may use the BruinBuy faxing capability to fax purchase requests directly to vendors	
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	m	Ш	Ensure the ordered goods or services are received and invoiced correctly -Department units should obtain and forward <u>original</u> vendor invoices to the Business Office <u>immediately</u> upon receipt	
		-Department units should obtain and forward <u>original</u> vehicles to the Business Office <u>infinediately</u> upon receipt -Submitted invoices must have the LVO or purchase order number written on the upper write hand corner		
	n Payment status  -Units are responsible for checking their open commitment ledgers and contacting vendors to ensure			
			dgers and contacting vendors to ensure navments have	
			-Vendor inquiries on payment status should be directed to the	
	Please consider these additional items when purchasing goods and services			
5	О		Personal expense reimbursements	
			-Reimbursements for non-travel and non-entertainment expen	nses are considered exceptions to the normal purchase
			methods and should only be used as a last resort	
	-Reimbursements for non-travel and non-entertainment expenses <a href="cannot exceed \$500">cannot exceed \$500</a> p		nses <u>cannot exceed \$500</u>	
			and the co	
			-riease refer to the business office's One Time Payment Rejer	ence Guide TOI additional details