



## Operational Procedure

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**Procedure Frequency:** For each purchase requisition submitted.

**Who is involved in the procedure?** The requesting department/divisional representative and/or Business Manager.

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### Policy

The Board of Regents approved the University System of Maryland (USM) Procurement Policies and Procedures. At UB, the Director of Procurement and Materials Management is authorized to develop procedures to ensure compliance with these Policies and Procedures.

### Purpose of the Procedure

To ensure the appropriate documentation is submitted for every purchase requisition entered into PeopleSoft which facilitates timely and accurate processing.

### Procedure

Each time a business unit/department submits a purchase requisition, the following must be submitted:

- (1) For all requisitions for goods or services, a quote must be attached/uploaded to the requisition.
- (2) The requisition must include the following specifications:
  - a. description of the item or service requested,
  - b. information regarding delivery requirement,
  - c. suggested vendors,
  - d. estimated dollar value.
- (3) For requisitions in which the vendor is not in PeopleSoft, a W9 must be attached/uploaded to the requisition.
- (4) Any vendor contract/agreement which the University must sign, is attached/uploaded to the requisition. Remember, only Procurement is authorized to sign any agreements on behalf of the University. See [USM Procurement Policies and Procedures](#) , Section E.1, Page 38.
- (5) If the requisition is for an item for which there is only a sole source vendor, the Business Unit/Department must attach a [Sole Source Justification](#) along with an explanation of the reason for the specific request.
- (6) For requisitions submitted for sub-recipients, travel reimbursements, stipends, award payments, leases, etc. all appropriate back-up documentation/form must be submitted.



(7) Take into consideration the detailed timelines (below) when submitting requisitions.

### **Processing Times**

The Office of Procurement and Materials Management processes requisitions using the following timelines:

1. For requests \$25,000 or less which do not utilize an existing University System of Maryland (USM), State of Maryland or other cooperative agreement, allow three (3) business days for processing.
2. All catering requests, not on Contract, must be submitted at least five (5) days prior to the event.
3. For requests which utilize an existing USM, State of Maryland or other cooperative agreement, allow three (3) to five (5) business days for processing (excluding Task Order Request for Proposals utilizing the Maryland State Department of Information Technology Contract).
4. For requests over \$25,000 and less than \$200,000 utilizing simplified procurement method (Request for Quote), allow ten (10) to fourteen (14) business days for processing.
5. For Task Order Request for Proposals utilizing Maryland State Department of Information Technology contract, allow for up to sixty (60) days.
6. For procurements over \$200,000 which do not utilize an existing USM, State of Maryland or cooperative agreement or any dollar value request which will be handled by a Request for Proposal (RFP ) or Invitation for bid (IFB), processing times may vary, however assume three (3) to six (6) months. The timeline will be established by Procurement in partnership with the requesting Department.

### **NOTE:**

- A vendor is **ONLY** authorized to provide a good or service over \$5,000 via an authorized Purchase Order issued by the Procurement and Materials Management Department. Verbal commitments issued to vendors by the Departments are not permissible as this violates USM Procurement Policies and Procedures and puts the vendor at risk of not being paid.
- To ensure the timely processing of requisitions, all backup documentation (ie: quotes, contracts, leases, forms, etc) **MUST** be attached/uploaded to the requisition and not sent to the Procurement staff via email. This includes multi-year contracts and exercised renewal options.
- It is prohibited to intentionally split orders to avoid procurement procedures as this is a violation of the USM Procurement Policies and Procedures and does not promote competition.
- Units should follow their internal (Divisional) pre-approval process before initiating this Procurement Business Process.

**\*Timelines may vary based on dollar value, complexity of procurement, additional approval(s) required, and the need to negotiate terms and conditions.**