

UT System Small Purchase Order (\$0.01 – 5,000.00) Requisition Guidelines

A “Small Purchase Order” is utilized in the following scenarios:

1. When purchasing goods and services valued at between \$1,000.00 and \$5,000.00.
2. When a vendor does not accept credit card payments for goods/ services below \$1,000.00
3. If the goods or services meet the above criteria and are not on the Products and services not requiring a Purchase Order list.

Small Purchase Orders do not require bidding from multiple sources (you select the qualified vendor of your choice). Multiple bidding is strongly encouraged to ensure best pricing/value.

General guidelines* for Small Purchase Order requisitions:

Step 1: Obtain a quote from desired vendor or contractor via email or fax. Quote must include shipping charges, and exclude sales tax. Please complete a [Tax Exempt Form](#) and fax to vendor if requested.

Step 2: Verify with Purchasing (ext. 3745) that the desired vendor is set up in *DEFINE. If not, please fax the vendor a [Payee Information Form](#) (PIF) to complete. Sole Proprietorships and Partnerships will also need to fax you a copy of Driver License or SS Card. Please forward completed PIF to Accounting and Purchasing for processing should your department not have the capability to complete a GGV in *DEFINE.

Step 3:

Quote obtained via email: If the quote is satisfactory, forward the quote via email to the proper signature authority in your department for electronic approval and account # to charge. Have the approver then forward the email containing the quote, approval and account # to purchasing@utsystem.edu. Purchasing will log your requisition, process a purchase order (PO) and send you an electronic version of the PO (Word doc.) for your records.

Quote obtained via fax: Write on the quote: “Request for P.O.”, followed by the proper approver signature, account # to charge, and date. Forward the approved quote to Attn: Purchasing, CLB 3. Purchasing will log your requisition and process a purchase order (PO) and send you an electronic version of the PO (Word doc.) for your records.

Step 4: When goods/ services have been received in good order, stamp the packing list/ work order “received” (goods) or “completed” (services), then sign and date. Forward the packing list/ work order to Purchasing where it will be matched to the invoice for payment processing. If you don’t receive a packing list with the goods, email purchasing@utsystem.edu to verify goods/services have been received/ completed. Please reference the PO# in your correspondence.

* Please note that the steps above outline the “usual” process involved in Small Purchase Order requisition processing. It is understood that exceptions to the rule will occur. If you feel you have an exception, please contact Kyle Hayes at 322-3745 before proceeding.