

University Of Massachusetts Lowell	
Date: July 01, 2001	Section:2.4.1
Subject: Purchase Requisition Flow – Purchase of Materials Only *	

A	B	C
\$1 - \$5,000 – Non Contract \$1 – Unlimited – Contract	Over \$5,000 Non-Contract – Competitive purchase requisition Advertises & Obtains Public Bids. If Contract – Follow Column A	Over \$5,000 Sole Source/Sole Acceptable Source/Brand If Contract – Follow Column A
Dept. researches purchase & maintains backup documentation, as may be appropriate. Dept. states where prices were obtained and when. Delivery terms must be stated.	Purchase requisition prepared by Dept. & attachments affixed Submitted, as appropriate. Dept. furnishes name & address of one or more suggested source of supply & Account Administrator signs purchase requisition.	Dept. researches purchase & determines only available from one source of supply.
If material is available on MHEC, Univ. or State Contract, Dept. must state the contract used on the purchase requisition. Dept. states where and when Prices were obtained. Delivery terms must be stated.	Purchase Requisition to Purchasing w/attachments, if applicable. Purchasing checks purchaser requisition to insure that purchase meets policy & that purchase requisition is complete.	Dept. obtains written quote from vendor
Purchase requisition is prepared by Dept. and signed by Account Administrator.	Procurement adds vendors & creates bid.	Documentation form for Sole Source/Sole Acceptable Source/Brand completed by Dept. & Signed by Requestor and Account Administrator
Purchase requisition to Purchasing	A bid opening date is established. Bid is mailed to suggested vendors & posted on a public bid board.	
Purchasing verifies that purchase meets policy; checks object code to insure purchase requisition is complete.		
Purchasing issues purchase order. Purchase order is mailed to vendor by Purchasing.	Purchasing opens & publicly reads bids on bid opening date.	Purchase requisition prepared by Department & signed by Account Administrator.
	Purchasing reviews bids & refers bids out to Dept. for review & recommendation. Department submits recommendation to Purchasing.	Purchase requisition quote & documentation form to Purchasing
	Purchasing reviews recommendation, & if all is in order, issues a PO.	Form & Quote is sent to Comptroller for review. If all is in order the Comptroller signs Sole Source Form.
	Purchasing mails PO to vendor.	Purchasing creates Purchase Order/maintains file & mails PO to the Vendor.

*For complete and accurate details, see the respective section of the Purchasing Manual that deals with the type of procurement that you wish to effect; e.g., Sole Source; State, University and MHEC Contract; Competitive Bids, etc. the flow is the same for most types of procurement; however, the dollar limits may vary; i.e., Contracts for Services, Equipment Maintenance, Equipment Rentals. (See Dollar Limits for Most Types of Procurements, Synopsis of, section 2.4)