

## Purchasing Guidelines

All purchases need a Requisition, created in PeopleSoft by End User. Unless a ProCard is allowed (UT Tyler Academic only), or the purchase has an exception. UT Tyler HS has limited Pcard access.

### Under \$15K...

- Purchasing or satellite buyers process the POs for UT Tyler Health Science. After Sept 1<sup>st</sup> 2025 those Reqs under \$499 will go back to the requestor as a PO to process or flow back to eshop Jaggaer system.
- UT Tyler Academic all POs go back to the requestor to process or flow back to eshop.
- PO Terms and Conditions need to be attached to the PO when needed or the vendor can click the link to take them to the PO T&C.

### \$15K to \$50K...

- Completed requisitions should include all supporting documents.
  - Informal Bid Process
    - Including freight and all additional service charges shall require a minimum of three (3) informal bids/quotes.
    - At least two (2) bids/quotes must be obtained from certified Texas HUBs, if available.
    - The Informal Bid/Quote Intake Form (DocuSign) must be filled out and reviewed by Procurement.
      - If the department is not going with the lowest bid, then they need to fill out an Exclusive Acquisition Justification form to justify why.
  - Departments may obtain one (1) quote when utilizing a UT System Supply Chain Alliance (UTSSCA)/Vizient contract or another accredited Group Purchasing Organization (GPO).
    - UT Health Science must use Healthtrust (HPG) when it's an Ardent clinical order unless UT Supply Chain has a HUB vendor.
  - GPO BuyBoard - To make sure (UT Tyler Academic only) receives their BuyBoard rebate(s), cc [info@buyboard.com](mailto:info@buyboard.com) when you send PO to the End User.
    - If applicable, agreements need to route through Symplr with all supporting documentation for legal review.

Over \$50K

- For Good(s) Departments may obtain one (1) quote when utilizing a UT System Supply Chain Alliance (UTSSCA)/Vizient contract or another accredited Group Purchasing Organization (GPO). Using an accredited GPO - The requirement to obtain a minimum of three (3) valid proposals (or two, if there are only two firms in the category) applies when procuring primarily services containing a Scope of Work (SOW) (e.g., consulting services) in order to identify “best value”.

For Formal Solicitations RFP/RFQ/IFB:

- Determine what kind of solicitation is needed with procurement/purchasing department) RFP/RFQ/IFB)
- Request for Proposal (RFP) is a formal solicitation method that requires evaluation of proposals based upon best value criteria established in Texas Education Code 51.9335(b).
- Request for Qualifications (RFQ) is used to identify a group of suppliers who meet a set of minimum qualifications.
- Invitation for Bid (IFB) is used when the good or service lends itself to a precise set of specifications, such as manufacturer part number (or equivalent), size, weight, voltage, CPU capacity, etc. The evaluation is based upon the best value criteria established in Texas Education Code 51.9335(b), with price and delivery often being weighted more heavily.

Templates for all RFPs/RFQs/IFBs Procurement/Purchasing will help departments in the solicitation process:

- The University of Texas System – Contracting and Procurement Practice Group (CPPG) Sample Documents. Goods/Services - <https://apps.utsystem.edu/OGCProtected/sampledocs.htm>
  - The University of Texas System – Construction Contracts and Solicitation Procurement Agreements - <https://www.utsystem.edu/documents/docs/general-counsel-documents/2024/construction-contracts-and-solicitation-procurement-agreements>

After the evaluation process Procurement/Purchasing:

- Send the team leader an email with a scoring summary asking for a recommendation statement based on the evaluation guidelines.
- Or Meet with the evaluation team to discuss scoring.

- Or Schedule presentations if needed and then evaluation team has another chance to evaluate based on information provided during presentation/meeting.
- Or send Best and Final Offer (BAFO) to Proposer(s), usually to the top one or two based on the natural scoring break. Then based on pricing changes (if any) the cost evaluation team can rescore if they want.

Award has been made:

- ❖ Procurement/Purchasing will send all rejection and award letters to the vendors.
  - ❖ Procurement/Purchasing will send all awardee proposal documents to the department.
  - ❖ Department works with the awardee on contract if applicable and routes through Symplr for signature. (If questions on contract contact legal)
  - ❖ Executed agreements with all required supporting documentation are sent to Procurement/Purchasing.
  - ❖ PO is sent to End User to forward to the vendor.
- Single Bid if approved **EAJ** (Exclusive Acquisition Justification) is provided and meets the EAJ/Procurement requirements.
    - If there is no agreement to be signed, then the End User will fill out the EAJ in DocuSign for approvals.
    - If there is an agreement the End User will fill out the EAJ in DocuSign and attach the document in Symplr.
    - If the supplier is providing a service or if the quote has T&Cs, then it will require a purchasing addendum.
      - Contracts are loaded into Symplr (used to store and route contracts as appropriate)
      - Contracts route for approvals within Symplr... next to last stop is Procurement/Purchasing.
      - Procurement reviews contract to ensure it meets Purchasing standards.
        - What is the initial term including any and all renewals.
        - Thresholds that may require additional documents/processes.
        - Contract end date.
        - All required supporting documents attached in Symplr.

- Contracts approved by Procurement/Purchasing are routed within Sympplr for final review before sending out for signatures.
  - All supporting documents are attached to the Pending PO in PeopleSoft.
  - Procurement/Purchasing reviews/approves the PO and sends to the End User or Vendor by email.
- UT Tyler Academic the End User is responsible for sending PO to vendor(s).
- UT Tyler Health Science the Purchasing department, Satellite Buyer or End User will be responsible for send the PO to vendor(s).