

Bid Waiver Form Requester Training



Request for Waiver of Competitive Bidding Overview

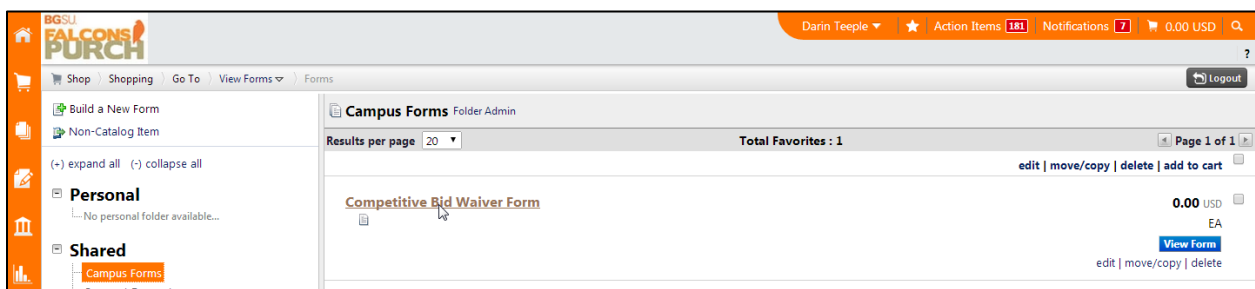
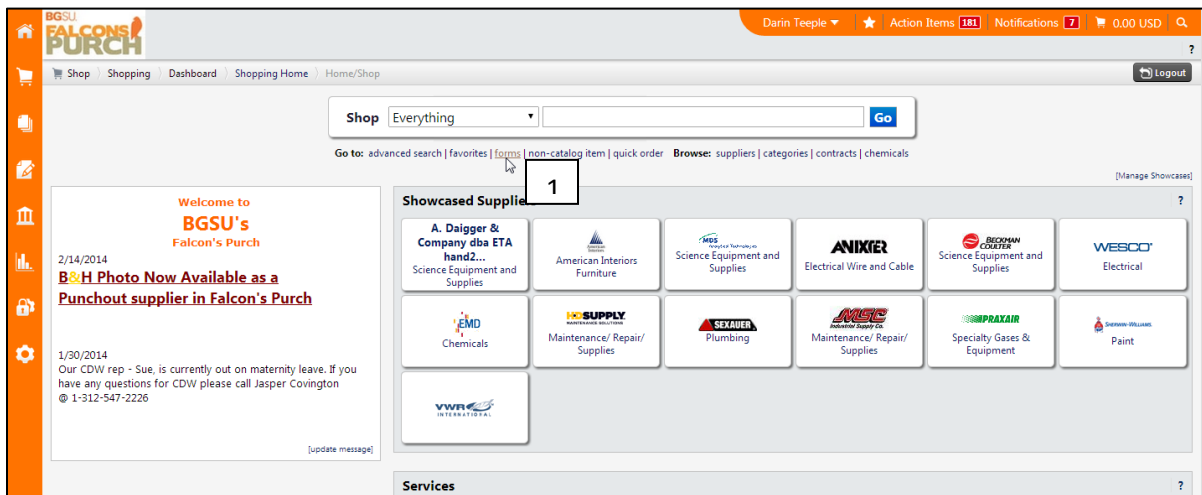
When justified, the Purchasing Department has the authority to waive competitive bidding for departments seeking to purchase or lease any equipment, material and/or supplies when the cost is \$25,000 or greater or for the procurement of services when the cost is \$50,000 or greater. The basis for granting waivers of competitive bidding are listed below.

- SOLE SOURCE:** Indicates there is not another vendor that provides the required goods or services. Sole Source requests must include a statement from the vendor on company letterhead indicating that the goods/services are only manufactured/supplied by their company and the quoted price is certified to be equal to the pricing given to supplier's most favored customers or other government agencies.
- EMERGENCY:** The goods or services are needed to correct or prevent an emergency health, environmental or safety hazard; special or time sensitive events; and/or emergency repair as determined by the President, CFO, or his/her designee.
- ECONOMIC:** When the University Division or Department has equipment or other goods and services from an existing vendor wherein it would be too costly to change vendors, then a case (description(s) of the excess costs and/or conditions to change) would need to accompany this waiver.

A form has been created in Falcon's Purch to streamline the Bid Waiver process. Below is a step-by-step guide to creating a bid waiver form and subsequently a requisition within Falcon's Purch.

Accessing the Bid Waiver Form

- 1) From the Home/Shop Screen, click on the forms link.
- 2) Click on the Competitive Bid Waiver Form link.



Form Navigation

- 1) Check the applicable bid waiver category.
- 2) Write a summary description for your need for the bid waiver.
- 3) Enter "Competitive Bid Waiver Form" followed by the product or service being purchased.
- 4) Enter Catalog number if applicable.
- 5) Enter Unit price.
- 6) Enter UOM.
- 7) Enter the date.
- 8) Enter the supplier.
- 9) Enter the commodity code.
- 10) Enter the requisitioning department name.
- 11) Enter the appropriate speedchart being charged for the purchase.
- 12) Attach all necessary documentation (this will transfer to the requisition and purchase order).
- 13) Go to Available Actions and select Add and go to Cart and click go (upper right of screen).

Sole Source
Indicates there is not another vendor that provides the required goods or services. Sole Source requests must include a statement from the vendor on company letterhead indicating that the goods/services are only manufactured/supplied by their company and the quoted price is certified to be equal to the pricing given to supplier's most favored customers or other government agencies.

Emergency
The goods or services are needed to correct or prevent an emergency health, environmental or safety hazard; special or time sensitive events; and/or emergency repair as determined by the President, VPFA, or his/her designee.

Economic
When the University Division or Department has equipment or other goods and services from an existing vendor wherein it would be too costly to change vendors, then a case (description(s) of the excess costs and/or conditions to change) would need to accompany this waiver.

Select One of the Options Below

Economic
 Emergency
 Sole Source

Competitive Bid Waiver form summary description.

Product Description: Competitive Bid Waiver Form - Product Description

Catalog No.: # if applicable

Unit Price: 26000

Quantity/UOM: 1 EA - Each

Date: 08/15/2013

Supplier: Fisher Scientific Co

Requisitioning Dept.: Purchasing

Speedchart/Project/Grant: 301000

Fax: +1 (630) 259-4515

Commodity Code: 10002010

Internal Attachments: add attachment...

Total: 0.00
See configuration for this form

Waiver Form

Available Actions: Add and go to Cart

BGSU
Bowling Green State University

Request for Waiver of Competitive Bidding

Purchasing Department
103 Park Avenue
ph: 419-372-8411
fax: 419-372-8416

When justified, the Purchasing Department has the authority to waive competitive bidding for departments seeking to purchase or lease any equipment, material and/or supplies when the cost is \$25,000 or greater or for the procurement of services when the cost is \$50,000 or greater. The basis for granting waivers of competitive bidding are listed below. Check the applicable category and provide written justification for each request. If required, attach documentation from vendor. The budget administrator must then sign and date this form and forward to the Purchasing Department for prior approval. Purchasing will then forward to the Vice President for Finance and Administration for approval, or in the absence of the VPFA, to the University's President.

Shopping Cart

You have now transitioned to your shopping cart and you will follow the same process as a normal requisition.

- 1) Proceed to checkout
- 2) Submit requisition

The screenshot shows the shopping cart interface for Darin Teeple. The cart contains one item: "Competitive Bid Waiver Form - Product Description" from Fisher Scientific Co. The total value is 26,000.00 USD. A red box with the number "1" highlights the "Proceed to Checkout" button.

Product Description	Unit Price	Quantity	Total
Competitive Bid Waiver Form - Product Description	26,000.00 USD	1	26,000.00 USD

The screenshot shows the requisition workflow interface for Darin Teeple. The workflow is at the "Accounting Codes" step. A yellow box contains the message: "You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: Internal Notes and Attachments. Go straight to the end: Final Review." A red box with the number "2" highlights the "Submit Requisition" button.

Business Unit GL	Speedchart	Fund	Dept	Project/Grant	Activity	Function	PC Business Unit	Account	Program	Budget Reference
BGSUN	301000OPER	10000	301000	no value	no value	6000	no value	53900	no value	no value
BGSUN	Business Ops-OPER	BGSU - BG Campus	Business Operations			Institutional Support		Misc Supplies		

Your requisition is now in the bid waiver workflow for approvals. Once approved through the entire workflow, it will follow the normal purchase order process.