

University of Alaska Fairbanks
Procurement & Contract Services
Equipment and Commodities checklist

- ✓ All commodities, instrument, or equipment acquisitions usually fit into one of three categories:
 - ___ 1a. **Specifications:** PI is open to obtaining quotations from several vendors for an item that will fulfill his/her requirements. Include all salient characteristics and technical specifications and/or ranges of the item(s) to meet the requirement of the project (*e.g. Item must be no taller than 52", weigh between 15-17 lbs, and be able to lift at least 100 lbs two feet vertically*).
 - ___ 1b. **Brand Name or Equal:** The use of a brand name or 'equal' purchase description is intended to describe the standard of quality, performance, and characteristics desired. It is not intended to exclude substantially equivalent products. An item shall be considered to be 'equal' when the University can reasonably anticipate similar quality, capacity, durability, performance, utility, and productivity as provided by the specified 'equal' product. This would be competed for best price.
 - ___ 1c. **Restricted Specification:** When the PI requires a particular brand name or manufacturer for Academic Application in the Classroom or Research they should use the Restricted Specification Form (RSF) (www.uaf.edu/files/purch/RestrictiveSpecForm.pdf). This form allows a PI to select a particular "brand name", and that is what will be purchased. **Note:** This is not to restrict the purchase to a particular "vendor", as the brand name may be available from several vendors/distributors. Ensure the RSF is filled out completely, signed, and dated by the PI. This form should not be used to circumvent competition or speed the process. If item is not for classroom use or research, but PI has justification for a sole source, forward a memo outlining reasons for limiting competition.

- ✓ Essential Back-up Information – to be provided by the department:
 - ___ 2. **Quotation:** A quote with price information from the vendor should be supplied by the department. Acceptable quotes include: quote on vendor letterhead, a page printed from an internet website, or an email quote.

- ✓ The REQ document, not the department internal requisition form, must include the necessary information:
 - ___ 3a. **REQ-Line Items:** Enter separate line items for each piece of equipment. Do not lump entire purchase together. Enter Shipping and Handling as a separate line item on the REQ if quoted.
 - ___ 3b. **REQ-Delivery Date:** Enter realistic date of when product must arrive. If the item **MUST** be delivered by a specific date, note that in the document text and include the statement, "Must be delivered by mm/dd/yy or cannot accept."
 - ___ 3c. **REQ-Document Text:** Enter information such as New Vendor (use modifier); vendor contact information such as name, fax number, email address; different shipping address; Cash Pay, Partial Cash Pay, or Wire Transfer (must include invoice); Special Terms or Conditions (vendor must have 50% prepayment, item must be ordered on Mon/Tue and be cold shipped to arrive on Wed/Thu only, etc.).

- ✓ Additional information to consider:
 - ___ 4. **W9 Form:** If it is a new vendor, note whether a W9 was requested.
 - ___ 5. **Unauthorized Purchase (UP) Form:** If the item on the REQ was acquired without a PO, down load the UP form (www.uaf.edu/files/purch/ua_form.pdf), fill it out, explaining the reason for the unauthorized purchase, and submit it to the Procurement & Contract Services Department with an invoice.
 - ___ 6. **Intellectual Property:** Are patents or copyrights involved?
Red flag: The vendor is manufacturing an item using our specifications.

- ✓ Have a question? Please contact:
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