



UNC Purchase Orders

Regina D'Uva

Kenan 225

919.962.6336

Need to Know


- For Goods and Services \$5000.00 or more
- Exceptions – under \$5000.00
 - Software
 - Radioactive materials
 - Gases
 - Warranties
 - Service Contracts
- PI must be involved with this process
- The process takes 2 to 3 weeks



Process

- **Get Quote from Company**
 - Letterhead of Company – with pricing & shipping
- **Fill out form: 1232.1.1f Form – Customer Request for a Brand/Vendor Specific Waiver of Competition**
 - Check boxes 1-18
 - Funding Source – Check box
 - Check Box that you are not getting compensation **Conflict of Interest Certification:**
 - **PI must sign**
- **Write Sole Source: Justification for the Product**
 - Sole Source must be on letterhead
 - Why you are choosing this vendor –
(say why with scientific reasoning for this vendor)
 - **Signed by PI**
- **Provide Funding Source: Chartfield String**

Send all documents to Admin. Support Office via email or in their mail

 THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

1232.1.1f – Customer Request for a Brand/Vendor-Specific Waiver of Competition

CASE OF REQUISITION NUMBER: R _____

Please check the appropriate justification(s) below for a waiver of competition, pursuant to the North Carolina Administrative Code ([01 NCAC 05B.1401](#)).

- ☐ Where performance or price competition is not available.
- ☐ Where a needed product or service is available from only one source of supply.
- ☐ Where emergency action is indicated.
- ☐ Where competition has been solicited but no satisfactory offers are received.
- ☐ Where standardization or compatibility is the overriding consideration.
- ☐ Where a donation predicated the source of supply.
- ☐ Where personal or particular professional services are required.
- ☐ Where a particular medical product or service, or prosthetic appliance is needed.
- ☐ Where a product or service is needed for the blind or severely disabled and there are overriding considerations for its use.
- ☐ Where additional products or services are needed to complete an ongoing job or task.
- ☐ Where products are bought for "over the counter" resale.
- ☐ Where a particular product or service is desired for educational, training, experimental, developmental or research work.
- ☐ Where equipment is already installed, connected and in service, and it is determined advantageous to purchase it.
- ☐ Where items are subject to rapid price fluctuation or immediate acceptance.
- ☐ Where there is evidence of resale, price maintenance or other control of prices, lawful or unlawful, or collusion on the part of companies, which thwarts normal competitive procedures.
- ☐ Where the amount of the purchase is too small to justify soliciting competition or where a purchase is being made and a satisfactory price is available from a previous contract.
- ☐ Where the requirement is for an authorized cooperative project with another governmental unit(s) or a charitable non-profit organization(s).
- ☐ Where a used item(s) is available on short notice and subject to prior sale.

Funding Source: ☐ State ☐ Trust ☐ Contracts & Grants ☐ F&A Funds

Customer's Statement (please elaborate on your justification(s) designated above by giving specific details):
PLEASE SEE ATTACHED LETTER OF EXPLANATION.

Conflict of Interest Certification: I certify that I am the requesting end user (must be PI for C&G funding sources) and that this requested procurement does not violate the University's policy on Avoiding Vendor Conflicts of Interest—<http://financepolicy.unc.edu/1211>. I (or spouse/partner) have ☐ no financial interests or relationships (such as board or volunteer positions, etc.) with the proposed vendor or I (or spouse/partner) have ☐ an interest or relationship with the proposed vendor which has been reviewed through the applicable COI process (approval attached).

Customer's Signature: _____ Date: _____



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Customer's Signature: PI Signature Date: _____

1-18 you must
check at least
One or more Boxes that
are appropriate with
this purchase.

Must check at least One
or more Boxes
If you are not sure – Adm can help


Must !! Conflict of Interest
certifications

ONLY PI Signature

Process

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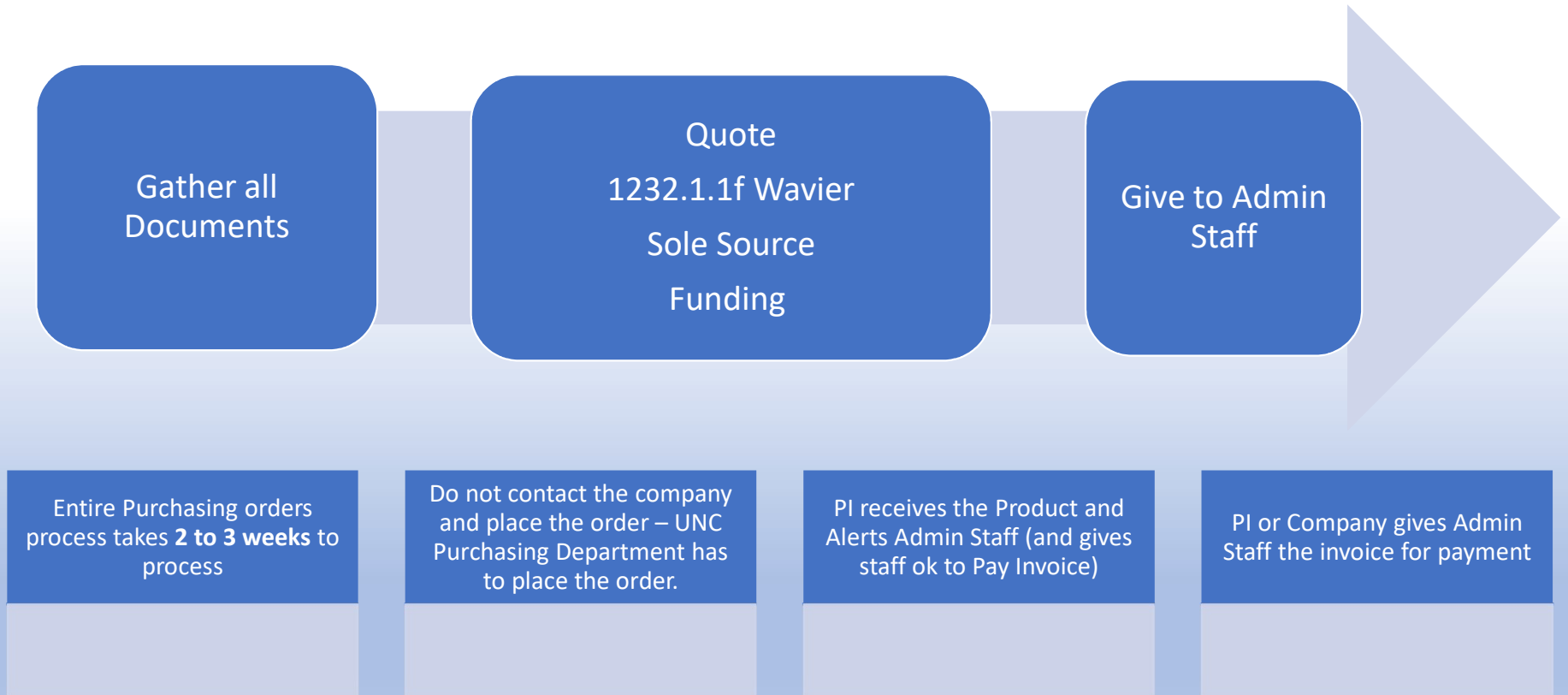
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Customer's Signature: _____ Date: _____

Timeline



Who to contact with Questions?

- Admin. Office located at Kenan 225

