

FORMS DOCUMENTS

- **Request for Purchase Order Form (RPO)**
 - Used for transactions and services that cannot take place until a PO or a PA has been approved
 - Used for purchases valued in excess of \$10,000 and equipment purchases exceeding \$5,000.
- **Departmental Purchase Orders (DPO)**
 - Used for purchases valued at \$9,999.99 or less
 - To request payment of an invoice
- **ANR Request for Contracting Out Services Form (COS) –**
 - Used when a vendor works on or creates something, a vendor requires access to a UC location or when a vendor is required to work on something that is owned by UC
 - Send to Ian Smith @ ijsmith@ucanr.edu for approval (can take up to a week)
- **Vendor Risk Assessment Form (VRA)**
 - Required when purchasing new IT related Software and services.
 - If product/software is available in AggieBuy, purchase can be made and no additional review is required.
 - Full list of software that has already been risk assessed can be found here: https://ucanr.edu/portal/vra_info.cfm
- **Software Related Services (SRS)**
 - This form is required for Procurement to proceed with the contracting process for any software or cloud-based services.
 - Needs to be submitted with the VRA
 - Needs to be signed by the Unit Head
 - Only needs to be included with new purchases. Is not required on an agreement where you're being billed monthly.
- **Entertainment Expense Form (EEV)**
 - This form must accompany entertainment expenses paid in KFS, it is not used for Aggie Expense entertainment transactions.
- **Facility Use Agreement (FUA)**
 - Documents the terms, expectations, and liabilities when UC ANR is using someone else's space for programs or activities.

- **Pre-Hire Form**
 - Complete prior to contracting or renewing a contract for independent contractor (individual) services to ensure the appropriate process to complete.

- **Small Business Waiver**
 - This document must be completed by the requesting department for all applicable non-Federally funded purchases valued >\$10,000 and <\$250,000 annual.

- **Scope of Work**
 - Required anytime the contract will cover services provided, regardless of whether the university is providing the services or a contractor will be providing the services.

- **Small Business Registration Form (webform)**
 - Register a small, diverse, women- or veteran-owned business with UC Davis
 - Link: <https://supplychain.ucdavis.edu/form/uc-davis-supplier-registration>

- **Sole Source Justification Form**
 - Only One Supplier
 - \$10K or higher transaction total for federal funded accounts, and an existing Purchase agreement is not being used, or purchase is not being made in AggieBuy.

- **Sole Source Selection Price form**
 - Required when using Federal funds over \$10K; other funds over \$100K

- **Confirming Order form**
 - This form must accompany any request for unauthorized purchases. This form is found in <https://wfa.ucanr.edu/>
 - A purchase made without the appropriate approvals being secured first

- **Declaration of Lost Receipt**
 - Complete this form when all means to obtain an original receipt have been exhausted.
 - This form is not used for Travel reimbursements.

- **Cognos Access Request Form**
 - Complete this form to request access to the Cognos Report system
 - Return to Scott Leaf @ sileaf@ucanr.edu, and Patricia Glass @ pjglass@ucanr.edu

OTHER COMMON FORMS

- **Approval Request for Organization Membership Dues**
 - Used for membership fees, you can find the form here <https://ucanr.edu/sites/anrstaff/files/322155.pdf>
- **Group Travel Request Form**
 - This form is to be completed when a group of individuals are traveling together, you can find the form here <https://ucanr.edu/sites/anrstaff/files/225534.pdf>
- **Approval Request Additional/Exceptional Entertainment**
 - This form is used for entertainment such as morale building or recognition of UC employees, the form can be found here <https://ucanr.edu/sites/anrstaff/files/378240.pdf>

Tip – *If you are not sure if a document is needed with your request always fill it out and include it. Davis purchasing will not reject a request for too many documents but will reject a request if something is missing.*

BOC Teams 1-5:

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