

Purchasing Checklist

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Software		
	Software Related Services Form Link (BOC Form Directory)	This must be signed by your director and be attached even if a VRA is not needed.
	Vendor Risk Assessment (VRA) VRA Request Form Link (ANR Portal) and VRA-Approved Listing	<p>Does your purchase include software?</p> <p>If yes, then you will need to work with IT to determine if a VRA is needed. You will need a Software Relates Services (SRS) form. Visit this webpage on Software & Application Purchases for more information.</p> <p>If no, then VRA or SRS is not needed.</p> <p>STOP – Even if your software is "FREE" it still could require a VRA.</p>
	Business Terms & Conditions (T & C)	This is required for all P3 & P4 Software purchases. Do not sign or agree to any T&C. Take a screenshot or download.

Forms		
	Capital Asset Form Form Link (BOC Form Directory)	Required with the purchase of any capital asset item (items above \$5,000)
	Conflict of Interest Form Link (BOC Form Directory)	<p>The statute prohibits most current university employees from contracting as individuals with any university department to provide goods or services as a contractor.</p> <p>In addition, the statute prohibits employees from engaging in any employment, activity or enterprise from which the employee receives compensation, or in which the employee has a financial interest, and which is sponsored or funded, in whole or in part, through a contract with the university.</p>
	Contracting Out Services (COS) Form Link (BOC Form Directory)	Must be signed by Employee Labor Relations (ELR), (Human Resources (HR)).
	Independent Contractor Form Form Link (BOC Form Directory)	Must be signed by ELR (HR).
	Small Business Waiver	<p>Required for any purchase over \$10K that is not construction or federally funded and is not a certified small business.</p> <p>Visit BOC's Purchasing page for more information on the Small Business First Program.</p>
	Sole Source Individual Disclosure Statement and Sole Source Price & Reasonable Justification Form	<p>Both of these are required and must be reviewed and approved by UC ANR Chief Procurement Officer.</p> <p>Visit BOC's Purchasing page for more information on Sole Source purchases.</p>

	Prevailing Wage	<p>The University of California (UC) requires all private construction contractors to follow public works law and pay their workers prevailing wages for applicable projects.</p> <p>State Funded Projects, On UC owned or leased locations, project will be more than \$1000, work will include construction, alteration, demolition, installation, maintenance and repairs.</p> <p>Visit BOC's Services & Contracting Out Services webpage for more information on Prevailing Wage.</p>
	Vendor Insurance Document	<p>Required for vendors that will be providing services on University property or products.</p>

Special Cases

For specific types of purchase, you may need to contact and obtain approval from the following ANR units:

ANR Risk Services Involvement

If you answer yes to **any** of these you MUST reach out to Risk Services: risk@ucanr.edu. If your purchase is not on this list, but it's similar to the following, still reach out.

	Does it need to be licensed?
	Does it require voltage over 110V?
	Does it generate extreme temperatures (hot or cold)?
	Are hazardous materials involved?
	Does it connect to a tractor (e.g. PTO, hydraulic, etc.)?
	Does it have an engine, even non-automobile (environment requirements)
	Refrigeration /Refrigerator/Freezer
	Drones or Unmanned Aerial Systems (UAS)
	Lab equipment (drying ovens, centrifuge, fume hood, etc)
	Shed/Storage container
	Any type of structure

Facilities Planning & Management (FPM Involvement)

ANR RECs or locations may request Purchase Orders to complete maintenance at ANR facilities.

Construction (including painting) and maintenance projects must go through FPM.

Definitions of the following can be found in the [UC Facilities Manual, Volume 6, Chapter 1.3.2](#)

Must consult with FPM and Risk Services for any permanent or temporary structures on non-UC property.

	Does your purchase include maintenance?
	Does your purchase include construction?
	Small Offsite Project Review (for shed/gazebo purchases) Are you purchasing a shed, gazebo, or structure to use at a non-ANR facility? If so, fill out this form and submit it to Facilities with a Director's signature.

IT Involvement

Must contact IT if any of the following apply: help@ucanr.edu

	Does what you want to purchase have the ability to accept credit cards?
	Will it be connecting to our network?
	Will it be storing data?
	Where is the equipment going to be used?
	How will the equipment be stored?
	Who will be using the equipment?

Vehicle Purchases

Contact Brian Oatman, Director, Facilities Planning & Management for vehicle purchases (baoatman@ucanr.edu).

	On Road Vehicles (Fleet & DMV requirements). This includes cars, trucks, vans, as well as trailers, etc.
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