

# Bid Waiver Form Requester Training

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## Request for Waiver of Competitive Bidding Overview

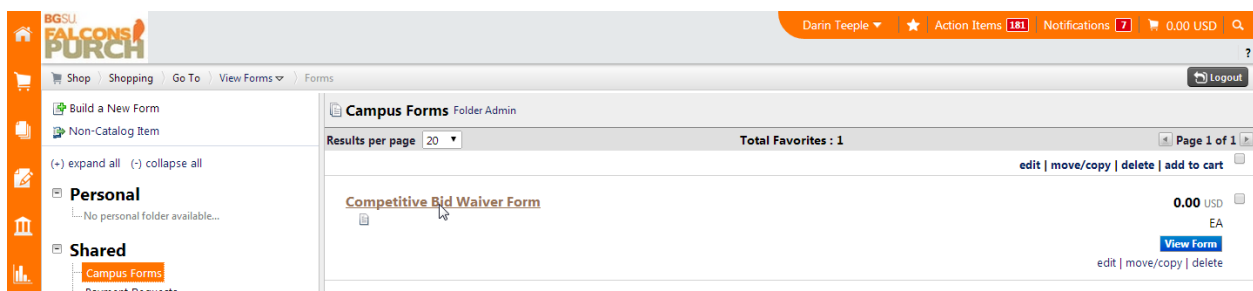
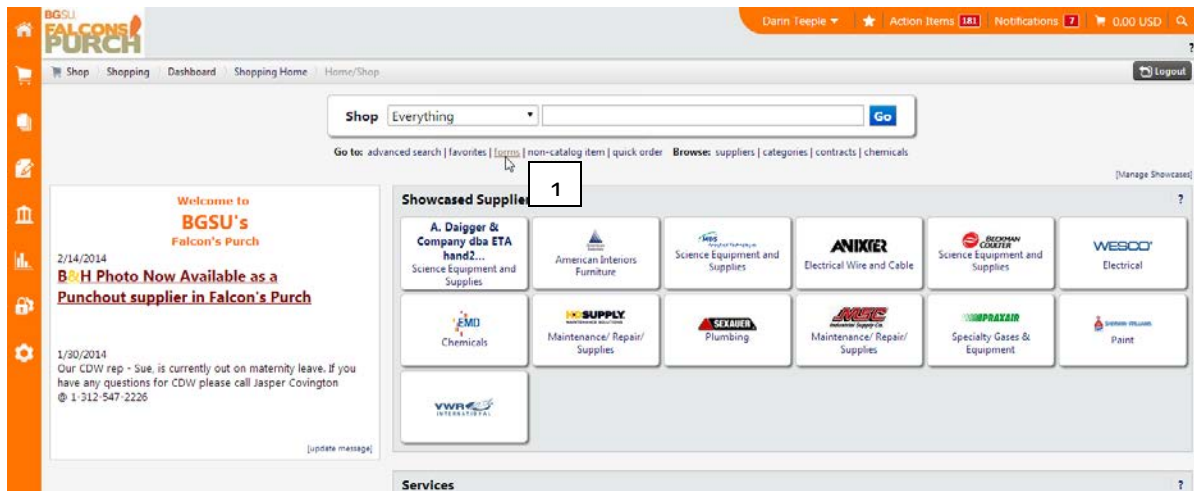
When justified, the Purchasing Department has the authority to waive competitive bidding for departments seeking to purchase or lease any equipment, material and/or supplies when the cost is \$25,000 or greater or for the procurement of services when the cost is \$50,000 or greater. The basis for granting 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 (Diagram on page 4)

- 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

2  Economic  
 Emergency  
 Sole Source

1

3 Competitive Bid Waiver form summary description.  
 205 characters remaining expand | clear

4 Catalog No. # if applicable

5 Unit Price 26000

6 Quantity/UOM 1 EA - Each

7 Date 08/15/2013

8 Supplier Enter Supplier Fisher Scientific Co

9 Commodity Code 10002010

10 Requisitioning Dept. Purchasing

11 Speedchart/Project/Grant 301000

12 Internal Attachments add attachment...

Total 0.00  
See configuration for this form

**Waiver Form** Available Actions: Add and go to Cart Go Close

**BGSU**  
Bowling Green State University

Request for Waiver of Competitive Bidding

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

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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

BGSU PURCH

Darin Teeple | Action Items 149 | Notifications 7 | 26,000.00 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Cart - 47620923 - Draft Requisition

Shopping Cart for Darin Teeple

Name this cart: 2014-02-17 DTEEPLE 01

1 Item(s) for a total of 26,000.00 USD

Proceed to Checkout or Assign Cart

Have you made changes? Update

Fisher Scientific Co

Product Description	Unit Price	Quantity	Total
Competitive Bid Waiver Form - Product Description Part Number: If Applicable Commodity Code: 10002010 SQ Equipment 10yr-life	26,000.00 USD 1/EA	1	26,000.00 USD

See configuration for this requisition  
view carts  
view cart history

BGSU PURCH

Darin Teeple | Action Items 149 | Notifications 7 | 26,000.00 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Accounting Codes - 47620923 - Draft Requisition

General | Shipping | Billing | Accounting Codes | Internal Notes and Attachments | External Notes and Attachments | Final Review

Submit Requisition or Assign Cart

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.

Requisition | PR Approvals | PO Preview | Comments | Attachments | PR History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

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

User does not have the necessary permissions to view the custom fields associated with this section.

For selected line items: Add To Favorites Go

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.

