



## UNIVERSITY OF MASSACHUSETTS DARTMOUTH PROCUREMENT MANUAL

### Section 4.8 - Entering Requisitions for Equipment

1. **General:** A Requisition and a Purchase Order are required prior to the shipping or receiving of any equipment. In order to ensure that policies & procedures pertaining to the procurement, receiving, tracking and disposal of equipment are adhered to, the following requirements apply when entering requisitions for equipment. For IT Equipment requisitions refer to *Section 7: Information Technology* for more information.
2. **Requisition Description Line:** In order for the item to be properly identified in the Fixed Assets portion of the Automated Procurement System, it is important that the description of the equipment item be entered using the following format: *the noun describing the item (e.g., "Vehicle"), the manufacturer's name and catalog or model number (e.g., "Ford E450"), followed by the rest of the description of the item (e.g., "15 passenger van, 158" WB, Gas, Turtle Top Body, Automatic Transmission, Automatic Passenger Door"), followed by the unit and total prices of the item.* Purchase Orders/Requests that are processed in any other format may be rejected.
3. **Account & Commodity Code:** Any item that meets the definition of "Equipment" as contained herein shall be charged to an "Equipment" Category Code, regardless of the source of funds. Refer to *Subsection 5.10: Account & Commodity Codes* for more information.
4. **Blanket Purchase Orders:** Any item that meets the definition of "Equipment" as contained herein shall not be entered in as a Blanket Purchase Order.
5. **Equipment to be used as a component in building another piece of equipment:** There are times when a department may wish to purchase component parts (not consumable supplies) to construct (not add to) a new piece of equipment as a part of a research project; e.g., robotics.

The component parts may be charged to an equipment object code only if the purchase is charged to a research grant/state matching fund that is restricted to equipment purchases and the Purchase Requisition is accompanied by a memorandum of explanation/justification that has received the prior approval of the Controller's Office, as well the Procurement Department.

The memorandum shall minimally name the project, what the finished product will be and the expected timeline for completion along with any other documentation required by the Controller's Office or Procurement Department upon request.

Upon completion of the construction of the piece of equipment, the department shall report the new equipment item to the Department of Property Control as a part of fixed assets.

6. **BuyWays Requisitions for Equipment Purchases should also:**
  - a. Include the applicable quote or proposal as an attachment in the "External Notes" section of the requisition to be distributed to the vendor.



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- b. If applicable, reference the appropriate contract or bid number in the “Internal Notes” section of the requisition.
  - c. If a non-contract/non-bid purchase between \$10,000 and \$49,999 then include 3 quotes or a Non Competitive Award Justification as an attachment(s) in the “Internal Notes” Section of the requisition.
7. **BuyWays Requisitions for Rental or Lease of Equipment should also:**
- a. If applicable, reference the appropriate contract or bid number in the “Internal Notes” section of the requisition.
  - c. Include the final rental/lease agreement which has been reviewed by Procurement and signed by the appropriate duly authorized representative of the University as an attachment in the “External Notes” section of the requisition to be distributed to the vendor along with the purchase order.
8. **BuyWays Requisitions for Equipment Maintenance & Repair/Operational Services should also:**
- b. If University, State, MHEC Contract or Bid reference the appropriate contract or bid number in the “Internal Notes” section of the requisition.
  - d. If greater than \$50,000, include the final agreement which has been reviewed by Procurement and signed by an authorized signatory on behalf of the University as an attachment in the “External Notes” section of the requisition to be distributed to the vendor along with the purchase order.