

How to Complete the New Sole-Source/Proprietary Justification Form in ePro November 2007

Purchasing has combined the “Sole-Source/Proprietary Justification Form for Products” and the “Sole-Source/Proprietary Justification Form for Services” into one form. The end-user will need to complete the three justification criteria items and the form must be approved by the appropriate departmental approvers (one approver for each dollar approval level) based on the overall cost.

While the new “paper” form can be used, a more convenient electronic version of this form has been added to PeopleSoft eProcurement which should satisfy 99% of your requests and will automate the approval process. Note: please do not use this form for DEP requisitions.

To locate and use the new electronic version of this form, create your requisition in eProcurement. From the Review and Submit page, click the Header Comments hyperlink:

Create Requisition

Settings → Find Items → Modify Shipping → Modify Accounting → Review and Submit

Requisition Name: *Origin:

*Requester: shon Hon, Sharon S. Priority: Medium

Description	*Qty	Unit	Price	Total
1 Equipment - Transducer	1.0000	EACH	2,500.000	2,500.00

Total Amount: 2,500.00 USD

Buttons: Add to favorites, Shipping, Accounting, Delete

[Header Comments](#)

Justification/Comments

Click the Copy Standard Comments hyperlink:

Header Comments

Business Unit: UTMBG Requisition Date: 11/12/2007

Requisition ID: NEXT Status: Pending

Retrieve Active Comments Only

*Sort Method: Comment Time Stamp *Sort: Ascending

Comments	Comment	Status
Copy Standard Comments	Copy Standard Comments	Active

Enter POC as the Comment Type and enter SOLE as the Comment ID. Click OK:

Standard Comments

Comments

*Action: Copy Comment

Comment: POC Comment ID: SOLE

Type: *Status: Active

*Effective: 11/12/2007

Date: Description: Short Desc: Comments:

OK Cancel

Place your cursor in the justification box below the first justification criteria:

Header Comments

Business Unit: UTMBG Requisition Date: 11/12/2007

Requisition ID: NEXT Status: Pending

Retrieve Active Comments Only Retrieve

*Sort Method: Comment Time Stamp *Sort: Ascending Sort

Sequence: Find | View All First 1 of 1 Last

[Copy Standard Comments](#) Comment: Active +

Status:

1. Identify the features or characteristics which are unique to the requested product/service, and/or unique qualifications of the individual/company as it relates to the requested product/service.

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Attach View Delete Email

Type the appropriate feature/characteristics which are unique to the requested product/service. Then arrow down to the second justification criteria:

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#) Comment: Active +

Status:

2. Briefly explain the need for the unique features or characteristics. (This explanation must address the critical importance of the unique or characteristics as it applies to its intended use and/or purpose in your operation.)

Type a brief explanation of need for this unique feature/characteristic. Then arrow down to the third justification criteria:

Comments Find | View All First 1 of 1 Last
Copy Standard Comments Comment Active
Status:
3. Identify other sources whose product/service(s) have been reviewed and why they are not satisfactory:

Enter the appropriate information to identify other sources that have been reviewed and why they are not satisfactory. Do not click the “Send to Vendor” box. This is an internal justification form and should not be sent to the vendor. Click the OK button to save this comment to your requisition:

3. Identify other sources whose product/service(s) have been reviewed and why they are not satisfactory:
 Send to Vendor Shown at Receipt Shown at Voucher
Associated Document
Attachment Attach View Delete Email
OK Cancel

Once the justification has been saved, budget check and submit your requisition for approval in the same manner as any other requisition:

Requisition Summary View All First 1 of 1 Last
Description *Qty Unit Price Total
1 Equipment - Transducer 1.0000 EACH 2,500.000 2,500.00
 Select All / Deselect All Total Amount: 2,500.00 USD
Add to favorites Shipping Accounting Delete
Header Comments
Justification/Comments
SOLE-SOURCE/ PROPRIETARY JUSTIFICATION
 Send to Vendor Show at Receipt Show at Voucher
Check Budget
 Save as Template
Save & submit Save & preview appri Cancel requisition Find more items

This process will automate the approval of your sole source/proprietary justification. When your approver reviews this requisition, they will see your justification on-line:

Requisition Approval							
Req Name: 0000257335							
Total: 2,500.00 USD							
Requester: Hon, Sharon S.				Business Unit: UTMBG			
Entered on: 11/07/2007				Requisition ID: 0000257335			
Status: Pending				Priority: Medium			
Requester's Justification:							
SOLE-SOURCE/ PROPRIETARY JUSTIFICATION							
<p>This justification has been designed to assist faculty and staff in providing information and the approvals necessary for the processing of requisitions for a sole brand and/or sole-source purchase of products or services.</p> <p>Your approval affirms that:</p> <ul style="list-style-type: none"> - No substitute or equivalent product/service exists in the marketplace that can meet your operational needs. - No employee/employer relationship exists (IRS regulations and guidelines). - The cost for the product/service is within the range of like products/services. - This supplier is not related to anyone who has authority over this purchase and has not been employed by UTMB within the past 12 calendar months (Government Code; Section 2252.901). - Supplier has not been paid by UTMB to develop/recommend specifications or requirements (Government Code; Section 2155.004). - The above statements are true and correct, and that no other material fact or consideration offered or given has influenced this recommendation for a sole-source/proprietary purchase. <p>1. Identify the features or characteristics which are unique to the requested product/service, and/or unique qualifications of the individual/company as it relates to the requested product/service.</p> <p>This equipment has the highest transducer frequency which is able to obtain a sufficient quality of ultrasound images.</p> <p>2. Briefly explain the need for the unique features or characteristics. (This explanation must address the critical importance of the unique or characteristics as it applies to its intended use and/or purpose in your operation.):</p> <p>In order to assess heart functions for our research, high transducer frequency is required.</p> <p>3. Identify other sources whose product/service(s) have been reviewed and why they are not satisfactory.</p> <p>We have tested other models from Acme and Widget but they did not have the high level of transducer frequency that is required for our research.</p>							
<input type="button" value="Edit Requisition"/>							
Line Information							
	Line	Item Description	Vendor Name	Qty	UOM	Price	
<input type="checkbox"/>	1	Equipment	SCIMETRICS-001	1.0000	EA	2,500.00 USD	
<input type="checkbox"/> Select All / Deselect All							
<input type="button" value="View Line Details"/>							