

# Purchasing Flow Chart

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This is the screen reader friendly version of the Purchasing Flow Chart (ADA compatible).

This document outlines the steps for procuring items or services. Please follow the instructions carefully to ensure compliance with all purchasing regulations.

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## 1.0 Mandatory Use and Contract Use Requirements

If the item or service can be purchased from one of the sources in Section 1, an executive branch state agency must buy from the source.

### (1A) Mandatory Use State Agency or Set Aside Contracts

- Is the desired item or service available from a mandatory use state agency or set aside contract (required use)?
  - If the item or service is available through one of the following agencies and meets the minimum requirement, the agency *must* purchase through these mandatory use providers which are:
    - Utah Correctional Industries (63G-6a-804)
    - Division of Technology Services (63G-63a-109.5)  
*Note for IT Products, Software, and Services:* The purchase of any IT product or service must follow the procurement requirements of the Division of Technology Services (DTS) regardless of cost.
    - Division of Risk Management (63A-4-103)
    - State Fleet Operations (63A-9-401)
    - State Mail and Distribution (63A-2-103)
    - Community Rehabilitation Program Set Aside Contracts (63G-6a-805)
  - **Yes, the desired item is available from one of these sources.** The agency must buy directly from the source. When ordering from these mandatory use agencies, competitive quotes are not required, and no dollar threshold applies.
  - **No, the desired item is not available from one of these sources.** Proceed to 1B.

### (1B) Agency's Current Contracts

- Is the desired item or service available from your agency's current contracts?
  - **Yes, the desired item is on an agency contract.** Purchase directly from the agency contract.
  - **No, the desired item is not on an agency contract.** Proceed to 1C.

### (1C) State Cooperative Contracts

- Is the item/service available through a State Cooperative Contract ([statecontracts.utah.gov](http://statecontracts.utah.gov))?
  - **Yes, the desired item is on a State Cooperative Contract.** Executive branch agencies *must* procure through a State Cooperative Contract, regardless of dollar amount, if the contract meets the agency's requirements (63G-6a-2105(3)).

- Before purchasing from a State Cooperative Contract, the end user must review the contract and follow the ordering instructions.
- Purchasing from an expiring contract is prohibited. The end user must ensure the contract's "expiry date," also known as expiration date, has not passed.
- **No, the desired item is not available on a State Cooperative Contract.**  
Proceed to Section 2.0.

## 2.0 Optional Use

### (2A) Utilization of Other Utah Public Entities

- Would the agency like to utilize items or services available from another Utah public entity, such as a state agency, university, or municipality?
  - **Yes, we do want to purchase from another Utah public entity.** A Utah public entity may purchase items produced or provided by another Utah public entity (as defined in 63G-6a-103(64)) without using a standard procurement process (see 63G-6a-2103).  
When purchasing from another Utah public entity, the ordering agency does not need to obtain competitive quotes, and no dollar threshold applies.
  - **No, we do not want to purchase from a Utah public entity** that is not a mandatory use agency. Proceed to Section 3.0.

## 3.0 Solicitation Process Based on Cost

If the item or service can be purchased in section 1.0, an executive branch state agency cannot use the processes below for the solicitation or purchase.

### (3A) Low-Cost Purchase Items (No Quotes Required)

- Is the cost of the highest priced item being purchased \$5,000 or less, AND is the total cost of all items being purchased \$10,000 or less?
  - **Yes, the highest priced item is \$5,000 or less, and I am not spending more than \$10,000 on the entire purchase.** For this purchase, no quotes are required. The agency may select the best source without seeking competitive quotes.  
The agency may not exceed \$50,000 in a fiscal year with a single vendor for purchases from the best source AND without obtaining quotes.
  - **No, the highest item exceeds \$5,000.** Proceed to Section 3B.

### (3B) Medium-Cost Purchase Items (Minimum Two Competitive Quotes Required)

- Does the highest priced item exceed \$5,000, AND is the total cost of all items being purchased \$10,000 or less?
  - **Yes, the highest priced item exceeds \$5,000 and I am not spending more than \$10,000.** The agency must obtain at least two competitive quotes.
    - The item or service must be purchased from the supplier offering the lowest quote that meets specifications stated in the request for quotation.
    - For detailed quote process instructions, refer to page 2 of the "Request for Quotation Sheet" in the "Solicitation Form" drop down list on [purchasing.utah.gov/purchasing/forms](https://purchasing.utah.gov/purchasing/forms).
    - If, after contacting all known vendors, only one vendor offers a quote, State Purchasing must be contacted for authorization to proceed.

- **No, I am spending more than \$10,000.** Proceed to Section 3C.

**(3C) Purchase Total Exceeding \$10,000**

- Will the total purchase exceed \$10,000?
  - **Yes, my total purchase exceeds \$10,000.** A solicitation must be completed by the Utah Division of Purchasing.
    - If a purchase order is required, the agency's finance team must submit an RQS in FINET.
    - If a contract is required, the agency's finance team must submit an RQM.
    - Email the information about what needs to be purchased to [purchasingsolicitations@utah.gov](mailto:purchasingsolicitations@utah.gov). Use the complete RQS or RQM number as the subject of the email (example: RQS 250 2612000001).