

Purchasing Flow Chart

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.

Section 1: 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.

A. State Agency or Set-Aside Contracts (Mandatory Use):

- Is the desired item or service available from a mandatory use state agency or set-aside contract (required use)?
 - **Yes:** 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:
 - 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)When purchasing from mandatory use agencies, the ordering agency does not need to obtain competitive quotes, and no dollar threshold applies.
 - **No:** Proceed to Section 1, Step B.

B. Agency's Current Contracts:

- Is the desired item or service available from your agency's current contracts?
 - **Yes:** Purchase directly from the agency contract.
 - **No:** Proceed to Section 1, Step C.

C. State Cooperative Contracts:

- Is the item/service available through a State Cooperative Contract (statecontracts.utah.gov)?
 - **Yes:** 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, the end user must review the contract and follow the ordering instructions.
 - Ensure the contract's "expiry date" is not past, as purchasing from an expired contract is prohibited.
 - **No:** Proceed to Section 2.

Section 2: Optional Use

A. 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:** A Utah procurement unit 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.

Section 3: Small Purchase Based on Cost

If the item or service can be purchased in section 1, an executive branch state agency cannot use the processes below for the solicitation or purchase.

A. Low-Cost Purchase Items (No Quotes Required):

- Is the cost of the highest item being purchased \$5,000 or less, AND is the total cost of all items being purchased \$10,000 or less?
 - **Yes:** 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:** Proceed to Section 3, Step B.

B. Medium-Cost Purchase Items (Minimum Two Competitive Quotes Required):

- Is the cost of the highest item being purchased exceed \$5,000, AND is the total cost of all items being purchased \$10,000 or less?
 - **Yes:** The agency must obtain at least two competitive quotes.
 - The item/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.
 - If, after contacting all known vendors, only one vendor offers a quote, State Purchasing must be contacted for authorization to proceed.
 - **No:** Proceed to Section 3, Step C.

C. Purchase Total Exceeding \$10,000 (Solicitation Required):

- Will the total purchase exceed \$10,000?
 - **Yes:** 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 purchasingsolicitations@utah.gov information about what needs to be purchased. Use the complete RQS or RQM number as the subject of the email (example: RQS 250 2612000001).