



PURCHASE ORDER (PO) CHECKLIST

- Amount of purchase including shipping, maintenance, warranties, renewals, etc. does not exceed \$5,000 if exercising Level 1 Contract Authority (L1SA) or \$25,000 if exercising Level 2 Contracting Authority (L2SA).
- Purchase is not being inappropriately split in order to avoid competitive limits or signature authority thresholds
- This Purchase does not give rise to issues involving the UO Ethics Policy or conflicts of interest.
- A unique identification number to the PO for tracking purposes. (if sending to PCS this may be left blank)
- Verified Contractor's full legal name and entity status with applicable Secretary of State Business Registry (not applicable for POs with individuals).
- PO does not reference any quotes or estimates that contain legal terms and conditions in addition to the PO Standard Terms and Conditions.
- Each line item on PO is numbered with a description, quantity, and unit price.
- The total PO amount is listed at the bottom of the PO.
- If required, insurance is noted on the PO and department has received valid certificate of insurance and endorsement from Contractor as requested.
- Purchase is either not with a State of Oregon contract, or if purchase is made pursuant to a State of Oregon contract, the mandatory language required in the PO instructions is in the body of the PO including the correct solicitation and price agreement numbers.
- If SPS approval is required it was obtained.
- For grant funded POs the following was confirmed:
 - Contractor is not on the Excluded Parties or Debarred Contractors listing.
 - Grant dates cover Contract services period as verified in Banner.
 - Grant funds are available as verified in Banner.
 - Department verified expenditure is allowable, allocable and reasonable.
 - If grant required special terms, those terms are included in the Contract.
- All other required approvals were obtained. See Approvals List: <https://pcs.uoregon.edu/content/forms>
- Neither contractor nor department has made any changes to contract or terms and conditions.
- All required attachments are uniquely labeled, referenced and have been provided to vendor as part of PO.
- PO references the appropriate terms and conditions by checking the correct box.
- PO is signed or approved by employee with current approved Level 1 Contracting Authority or Level 2 Contracting Authority, as appropriate. (if sending to PCS DO NOT sign)
- If submitting to PCS for approval please submit in editable format (Word or Excel)
- Purchase file for this matter contains all required documentation including, but not limited to the signed PO, this checklist, notes and related communications.

Please contact PCS if you have any questions on the PO process.

By: _____ Printed Name: _____ Date: _____