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# PROCUREMENT PLANNING CHECKLIST

Use this checklist to keep track of all required documentation and forms required for your purchase.

- **Procurement Policy & Forms** are located on the Procurement & Payment Services website:  
[www.liberty.edu/finance-admin/procurement/policy-forms/](http://www.liberty.edu/finance-admin/procurement/policy-forms/)
- **Got questions?** Contact Procurement by email or phone:
  - **Email:** [procurement@liberty.edu](mailto:procurement@liberty.edu)
  - **Phone:** (434) 592-3012

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## SUPPLIER

- Check to see if supplier is registered in BuyLU: Suppliers > Search for Supplier
- If you need a new supplier, request one by going to BuyLU > Suppliers > Request > Request New Supplier
- New supplier request requires current year W-9 and COI (if required)

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## CONTRACT

- Ensure supplier is registered in BuyLU. If not, submit a supplier request before submitting contract request
- Submit contract request in BuyLU
- Quote
- Agreement (contract, terms & conditions, etc.)
  - If ICA, need ICA and ICA Questionnaire
- COI (if required)
- Supporting Documentation (as needed)
- Receive request from Contract Administrator to submit requisition

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## CREATE A REQUISITION

- Determine whether purchase can be made via a BuyLU catalog. If not offered via catalog, submit non-catalog requisition
- Confirm supplier is active in BuyLU. If not, Request New Supplier
- If a contract is involved, submit new contract request in BuyLU. Wait for request from Contract Administrator to submit requisition
- Submit non-catalog requisition
- Attach corresponding documentation (Quote from vendor, contract, statement of work, proposal, etc.)
- For requisitions valued at over \$15,000, multiple formal bids are required. For promotional products, multiple formal bids are required, and the threshold is reduced to \$1,000

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## RECEIVING

- Once item arrives, create receipt on PO in BuyLU

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## PAYMENT

- Instruct vendor to email invoices to Payment Services at [acctspay@liberty.edu](mailto:acctspay@liberty.edu)