Completing the Waiver of Bid Request Form
What’s different in UD Exchange?

Bid Waiver/Sole Source Form

In Webforms, the department would complete and attach a Word document to the requisition in order to request a bid waiver.

In UD Exchange, the Waiver of Bid Request IS the form by which one submits the sole source justification, and it becomes the requisition.
Waiver of Bid Request

• The purpose of this form is to confirm the requesting unit has taken the necessary steps and provided documentation to demonstrate the appropriate justification for the requested procurement in accordance with University Procurement Policy (Legacy Policy 5-01) and applicable Federal, State and local laws, regulations, codes and ordinances.

• This form must be completed when a unit seeks to procure goods or services $10,000 or greater in situations where competition is restricted or limited in such a manner that it precludes the university from obtaining informal or formal bids/proposals/quotes.
1. From the Shopping Home page, scroll to Procurement Forms
2. Click on Waiver of Bid Request tile
1. Read the instruction information.
2. If you have determined this purchase requires a Bid Waiver, click **Next**.
1. Enter Supplier information
2. Click Search
1. Click **Select** on the correct location from the options.

2. Supplier fulfillment center will populate at the top of the page.

3. Click **Next**.
1. Click **Add Attachment** to attach pertinent documents.
2. Click **Save Progress**.
   - Repeat as needed for all documents
3. Click **Next**

At any point, you can click **Save Progress** to leave the form and return to it later.
1. In **Form Fields**, click **Line Details**. Here you will indicate if the purchase is Grant Funded and if the purchase will require more than one line item (i.e. accessories, shipping, etc.)
1. This example is not Grant Funded but does have two lines.

2. Click in the box for each line number that will be on the requisition. Scroll down to continue.

Ideally, the requisition’s line items should match those on the quote.
1. To enter the **Commodity Code**, click **Edit**. A search window will appear for you to enter search criteria. Select the correct **Commodity Code** and the code will populate on this page.

2. When you have completed entries for all lines, click **Next**.

This example shows the *equipment* on line 1, and the five-year *service* agreement on line 2.

If not broken out by line item, capitalized equipment should include all amortized costs. At the minimum, items should be split by commodity. Otherwise AP may have trouble invoicing and tagging appropriately.
1. In the **Waiver Details** section, scroll through and choose by clicking the check box below the reason(s) that best applies to your bid waiver purchase.

2. Scroll to the **Support Narrative/Justification** and enter your explanation.
1. Scroll to the bottom of the page and click **Agree**.

2. Click **Next** to proceed.
The Review and Submit section gives you the opportunity to review and, if necessary, return to a previous section to edit. If all is complete and correct, click Add and go to Cart.

If you have more than 10 lines on your requisition, choose “Save to Cart and Add Another” for the additional lines.

Be sure your cart is empty or you will get a “Do Not Mix” error. Alternatively, you can choose “Add to New Cart” from the dropdown in the yellow box.
1. Name your cart.

2. If the lines will be NOT be invoiced by quantity, or a deposit on the total is required, check the Multi-Invoice/Payment box.

3. Scroll down to the lines.
1. If you have a line invoiced differently from the rest, click on the **PO Type Override** box for that line. This is necessary for successful sync to PeopleSoft.

For instance, if you have itemized your items but have a “bucket” of hours for service that is amount-based, or if you have multiple payments against a quantity of one but a zero-dollar line.

2. Click **Proceed to Checkout** to add details and funding and submit the Request, or click **Assign Cart** to submit it to another Requester for review (continues on next page).
Add your address:
1. Click edit (Pencil Icon) under Shipping.
2. Choose a default address or enter a keyword into the Search until the address pops up and select it.
3. Complete name and room number.
4. Click Save.
If you are a Shopper in UD Exchange, Click **Assign Cart** to submit your Waiver of Bid Request to a Requester.

If you are a Requester in UD Exchange, you will have the option to complete additional information and **Place Order** to submit your Waiver of Bid Request or click **Assign Cart** to submit it to another Requester for review.
Retrieving a Saved Form

1. If you saved a draft by clicking “Save Progress” and left the form, go to Orders>Search>Procurement Requests to retrieve it.

2. There you will find all draft form requests not yet added to shopping carts to be made requisitions.
Resources

Procurement Services
procurement@udel.edu
See also, “Adding Financial Information to Requisitions” and “Introducing the Purchase Order Type Override (POTO Box)”