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 Waiver of Bid Request
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
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.
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.
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 complete, click **Next**

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

Capitalized equipment should include all amortized costs; otherwise items should be split by commodity.
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 further down and complete the **Supportive Narrative/Justification**. A written explanation is required.

3. Click **Agree**
4. 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**.
1. Name your cart.
2. Click Save.

3. 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 click Proceed to Checkout 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>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”