

TASK

Revised Date: October 1, 2021

Effective Date: March 20, 2015

Approved by: Chief Procurement Officer

Authority: LAC34: XIII.U501.B

See Also:

PRO-U501.B.01 (Sole Source Procurements)

FRM-U501.B.01 (Sole Source Justification Form)

FRM-U501.A.03.A (Request for Quote)

TSK-U501.B.01.03 SOLE SOURCE PROCUREMENTS – COMPATIBILITY WITH EXISTING GOODS/SERVICES

This task outlines the process to be followed when submitting a sole source request/justification for ‘Compatibility with Existing Goods/Services’ to Procurement for review and approval.

Definitions:

1. *Compatibility with Existing Goods/Services* – A department requires an additional part or service that is compatible with existing goods or services (has the capacity to work with the original and/or existing good/service without having to be altered to do so).

Action by:

Purchasing Agent
(User Department)

Action:

1. **Completes LSU Sole Source Justification** (See FRM-U501B.01).
To maintain compatibility and continuity, department must indicate that the purchase must be made from the original manufacturer/supplier from whom existing equipment was purchased.
 - a. If equipment, department must provide a list of the existing parts/equipment and equipment tag numbers.
2. **Obtains** a written statement from the supplier confirming the supplier is the sole manufacturer and the sole distributor of the goods or services to be purchased.
 - a. If equipment, supplier must confirm only their equipment (no other similar or like equipment from another supplier) will provide for full compatibility and functionality with the existing equipment.
3. **Obtains** a completed **LSU Quote Form** from the sole source supplier. (See FRM-U501.A.03.A)
4. **Obtains** a current insurance certificate from the supplier in the event onsite installation/training is required. Insurance requirements can be found at: <https://www.lsu.edu/administration/ofa/procurement/a-z-policies-procedures/insurance.php>
5. **Obtains** the following, if necessary, before submitting requisition:

- a. Equipment operated via an electrical receptacle must have Facility Services approval via the **Facility Services Purchase Approval Form** located at: <https://www.lsu.edu/fs/files/facility-services-purchase-approval-form.pdf>
 - b. Equipment being traded in must have written approval from Property Management
6. **Creates** a requisition itemizing goods and/or services to match supplier quote and **attaches** all required documentation.
7. **Submits** requisition for review, approval and issuance of a purchase order.