

TASK

Effective Date: March 20, 2015

Approved by:

Chief Procurement Officer

Authority: [LAC34: XIII.U501.B](#)

See Also:

[PRO-U501.B.01](#) (*Sole Source Purchases*)

[FRM-U501.B.01](#) (*Sole Source Justification Form*)

[FRM-U501.A.03.A](#) (*Request for Quote*)

TSK-U501.B.01.03 SOLE SOURCE PURCHASES – 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/vendor 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: <http://www.lsu.edu/administration/ofa/procurement/a-z-policies-procedures/insurance-requirements.php>

Procurement Buyer
(Procurement
Department)

5. **Obtains** the following, if necessary, before submitting requisition:
 - a. Equipment operated via an electrical receptacle must have written approval from Facility Services
 - b. Equipment being traded in must have written approval from Property Management
6. **Creates** a requisition and **attaches** all required documentation; **Submits** requisition for approval.
7. **Receives** Workday requisition in “In Progress” awaiting review.
8. **Reviews** requisition to ensure compliance of Sole Source Procurement Procedure and Task requirements.
9. **Routes** to Assistant Director/Associate Director/Director for approval.
10. **Issues** Purchase Order upon approval.