University at Buffalo

Purchasing Software Solutions Questionnaire

Instructions: Please follow the steps listed in this document for software purchases under $50,000 annually or grand total of multi-year agreement*, prior to selecting a vendor/product or creating a purchase request. Once all necessary approvals have been received in the below **two** steps, attach this completed form, along with the completed VPAT, and completed UBIT Vendor Questionnaire to your eReq and submit to Purchasing. It is the department's responsibility to ensure the steps below are completed **PRIOR** to submitting a purchase request.

*Software procurements over $50,000 annually or combined total of multi-year agreement should be discussed with a purchasing agent prior to beginning this process. Contact the listed purchasing agent(s) on the Purchasing Software website.

GENERAL INFORMATION

Business Purpose:
1. What is the intended business purpose of the product or service that you are looking to purchase?

2. Is it replacing a current product? If so, what product?

3. Have the Purchasing Dollar Thresholds been followed?

STEP ONE: COMPLETION OF ACCESSIBILITY CHECK

The university has instituted a Web Accessibility Policy to ensure that UB's websites, electronic communications, and other online information are accessible to individuals with disabilities. It is the department's responsibility to ensure all purchase requests meet the university's accessibility policy by following these steps:

1. Download the Voluntary Product Accessibility Template (VPAT)
2. Request that the vendor complete the VPAT and return it to you.
3. Department must send the complete VPAT along with this completed Purchasing Software Solutions Questionnaire to diversity@buffalo.edu for review and approval prior to moving on to Step Two.
   ➢ A member of the Office of Equity, Diversity and Inclusion will reach out to the person listed in the department contact section of this form if more information is needed and to provide approval.
4. Once approval has been received from the EDI office, complete Step Two.

➢ More information regarding accessibility can be found at UB's Accessibility Web Portal

STEP TWO: UB DATA USE AND RISK-ASSESSMENT

The University divides data based on institutional risk from disclosure. Please complete the steps as outlined:

1. Determine what type of data, relative to the Data Risk Classification Policy your vendor and/or product will be using, and check the appropriate box below.

   ➢ Check with your IT Node Support Staff, ISO Office, or University Data Custodian if you are unsure of what type of data relative to the UB Data Classification Standard you intend to use.

   Category 1 (High) – Requires VP/CIO approval AND completion of the UBIT Vendor Questionnaire for IT Purchases

   Category 2 (Medium) – Requires VP/CIO Approval AND completion of the UBIT Vendor Questionnaire for IT Purchases

   Category 3 (Low-Medium) – No VP/CIO Approval Required

2. **If you checked the box for Category 1 and/or Category 2 data use**, please send the UBIT Vendor Questionnaire for IT Purchases to your vendor and request it be completed in full and returned to you. When returned, send that completed UBIT Vendor Questionnaire, along with this completed form, to the VP/CIO area for review via email: ub-itpurchase@buffalo.edu

   ➢ A member of the VP/CIO area will reach out to the department contact listed on this form for review/approval.

   ➢ Once the UBIT review/approval has been completed, create an eReq and upload this completed form, along with the UBIT Vendor Questionnaire for IT Purchases, and the vendor's completed VPAT. Be sure to also include any necessary agreements, quotations or other relevant documents, and send to Purchasing for completion.

3. **If you checked the box for Category 3 data use**, no VP/CIO review or approval is needed. You are **NOT** required to have the vendor complete the UBIT Vendor Questionnaire for IT Purchases. Create an eReq and attach this completed form, the vendor's completed VPAT, and be sure to include any necessary agreements, quotations or other relevant documents, and send to Purchasing for completion.

4. Purchasing will reach out if any other information is needed, and complete the purchase request.

Department Contact Information:

Name: _____

Email: _____

Phone Number: _____

Estimated time frame of purchase: _____

Procurement is subject to threshold requirements and could require review by legal counsel, CIO office, and/or Financial Management.

We recommend requisitions arrive in purchasing 2-3 months in advance of a new purchase and renewals to allow for all required reviews and negotiations of agreement terms and conditions.