

Web-based Services and Software Pre-Purchase Form (over \$50,000)

Purpose: The goal of this process is to incorporate review and approval by the Vice President Chief Information Office (VPCIO), Financial Management and the Office of Equity, Diversity and Inclusion (EDI) prior to the purchase. The end result of the review process is to provide a recommendation and/or approval regarding the purchase of the software or application.

Use this form when: Your procurement exceeds \$50,000 (total agreement or contract value, not annual value) regardless of funding source. This allows purchasing to determine who should be included in initial meetings and/or the procurement process.

Applies to: [Comprehensive Services and Software List](#)

Important instructions: Complete this form prior to selecting a vendor/product, meeting with vendors, or creating a purchase request in case a bid is required for this product or service.

BUSINESS PURPOSE & PROCUREMENT

1. What is the intended business purpose of the product that you are looking to purchase?
2. Is it replacing a current product? If so, what product and current expiration date of agreement/contract?
3. What is the estimated dollar value of your procurement?
4. What type of funds are allocated for this procurement? State, UBF or RF?
5. Estimated time frame of purchase?

FINANCIAL MANAGEMENT

1. Does this product use a credit card processing solution?
Yes No
2. Are you requiring this service be used by students for learning?
Yes No
3. If yes, is there a fee to students?
Yes No
4. Are you collecting any rebates, refunds, or other payments back from vendor?
Yes No

ACCESSIBILITY IN TECHNOLOGY:

1. Is this solution being used by or can be accessed by the public?
Yes No
2. Is this solution campus-wide for all faculty, staff and students
Yes No

3. If this service is for students, are you using in more than one course?
 Yes No

If yes, please list all courses:

UB DATA USE AND RISK-ASSESSMENT:

The university divides data based on institutional risk from disclosure.

Check with your [IT Node Support Staff, ISO Office, and University Data Custodian](#) if you are unsure of data usage requirements.

1. Is there any sensitive data being shared with the supplier (personally identifiable information, student data, research health information, confidential IP or PCI)?
 Yes No

If yes, what specific data is being shared?

2. Is there any HIPAA related information being shared?
 Yes No

3. Determine whether integration with or data from existing UB IT services is required:

May require integration with existing UB IT Services
 Yes No

May require data from existing UB IT Services
 Yes No

Department Contact Information:	IT Node Support Staff Contact Information:
Name:	Name:
Email:	Email:
Phone:	Phone:

Date Form Completed: _____

Department Approval Signature: _____

Procurement is subject to threshold requirements and could require review by legal counsel, CIO office, and/or Financial Management. Most purchases over \$50,000 require a competitive solicitation and may be subject to additional approvals at the Office of State Comptroller and Attorney General.

Email completed form and any questions to Cheri Weber ubmcheri@buffalo.edu who will schedule a meeting to determine next steps with the necessary UB staff.