Trustee Purchase Method Decision Tree

START

Product/service offered by a UCONN Dept? — Yes → **Select Internal Billing(IB)**
Examples: Catering, Document Production, Advertising, A/V, Security

No

Product/service part of a University Contract? — Yes → **Select Husky Buy Contract (HBCO)**
Promo Items, Novelty, busses – quotes directly from vendors, SOW (not PSA) for entertainment vendor - https://purchasing.ubs.uconn.edu/university-of-connecticut-contracts/

No

Product/service in HuskyBuy Catalog? — Yes → **Select Husky Buy Catalog (HBCA)**
HB Shopping Page: Tech- Apple, Dell, GovConnection, CDW-G, and Anixter Inc, and for Office Supplies-W.B. Mason.

No

Speaker, performer, coach or production non-univ contract vendor >$2500? — Yes → **Select HuskyBuy Non-Catalog Purchase (PSA)**
WARNING
Performer, Speaker, Entertainer, Coach that requires a Personal Service Agreement to solidify all the relevant details – your org may have to facilitate the set-up of the vendor in HuskyBuy. PSA can be used if under $2500 but must be used if over $2500 https://contracting.ubs.uconn.edu/psa-procedure/

No

Non-Catalog Vendor for multiple events through the year? — Yes → **Select Blanket PO (BPO)**
WARNING
Use of a single vendor for similar events/ activities over the course of a semester or year for supplies, services, refreshments - your org may have to facilitate the set-up of the vendor in HuskyBuy.and you should get quotes directly.

No

Non-Catalog Vendor for a single purchase? — Yes → **Select Husky Buy Non-Catalog (HBNC)**
WARNING
Supplies, service providers, local restaurants and stores for single purchase - your org may have to facilitate the set-up of the vendor in HuskyBuy.and you should get quotes directly.

No

Is this <$5K item purchase from a one-time vendor? — Yes → **Select ProCard (PCDO)**
One-time purchase of low dollar value. Purchasing from Amazon can only be done if all HuskyBuy options have been exhausted. Must adhere to ProCard policies: https://purchasing.ubs.uconn.edu/category/procurement-services/procard/

No

Is this Travel? — Yes → **Use Travel Process (TRAV)**
WARNING
Storrs Off-Campus Activity Advising requires submission at least 3 weeks in advance of travel eg Airfare, lodging, mileage, ground travel, meals

No

Is this refreshments or supplies and no way to pay direct? — Yes → **Reimbursement is a last resort and never for equipment or services (REIM)**
Student purchasing refreshments for a highly specialized diet, emergency supplies and until concur in place, some travel expenditures such as baggage fees, ground transportation, etc.

Over $50K? — Yes → **May require formal bid run by Procurement** WARNING
No

Over $10K? — Yes → **May require RFP process run by Procurement** WARNING
No

Over $5K? — Yes → **3 Quotes or Sole Source Form must be part of purchasing packet**
No

Keep all other quotes with organization records as may be required to produce them

WARNING

Allow for extra time for these activities: Setting up a new vendor, doing a PSA or Procurement doing a formal bid or RFP.