Sole Source DocuSign Form Instructions

Department must obtain approval via email from Purchasing Department before starting DocuSign Form.

Obtaining approval

1. **Create a requisition** – The requisition must be in Purchasing's queue before feedback is provided on the sole source information.
2. **Upload backups:** Include the quote and other documents related to the purchase, as well as the sole source PDF or Word documents, along with your responses to the following:
   a. **Description of Request**: Describe in detail the goods or services to be procured and how they meet your needs.
   b. **Unique Features:** List the specific feature(s) or characteristic(s) that are required and unique to the good or service.
   c. **Special Needs:** Briefly explain why the unique specifications restrict the requisition to one manufacturer or provider.
   d. **Other Sources:** Identify other sources that were evaluated and explain why they were found to be unsatisfactory for the intended use.
3. The Purchasing Department will review and provide feedback via email
4. Once approval is obtained from the Purchasing Department, departments can begin the Sole Source DocuSign Form

Sole Source DocuSign Form

1. Open the form in your web browser:
   https://uhdowntown.sharepoint.com/sites/DocuSignatUHD
2. Fill in the PowerForm Signer information:
   a. Requester - Person requesting the proprietary purchase
   b. Department Approver - Must be the Department/Division Head
3. Click Begin Signing
4. Click Got It and Continue on next screen
5. Fill in the required fields of each section
   a. General Information
   b. Contact Information
   c. Vendor Information – The vendor's name must exactly match what is listed in PeopleSoft
   d. Goods/Services Information
   e. Description of Request, Unique Features, Special Needs, Other Sources
      i. Use approved responses for these fields
   f. Attach additional/supporting documentation
6. Click the Sign button next to your name to sign the form
7. Click Finish at the bottom
8. You will receive a confirmation email after submission
9. After all approvals are obtained, you will receive a final copy