Guide to Complete Sole Source Form Using DocuSign

1. The requester will enter their name and email along with their Department Head’s name and email
   a. Department Head - the person responsible for the daily operations of an academic or administrative department

2. The Procurement Services, Senior Procurement Officer, and Director of Procurement roles will not be edited by the requestor. Select “Begin Signing” to start the sole source form completion

3. Select the check box to agree to DocuSign’s electronic records and signatures then select “Continue”
4. Complete the applicable fields on the form (red indicates a required field)

   **Sole Source at Proprietary Procurement Approval Request**
   
   Date: [ ]
   Vendor: [ ]
   Department: [ ]
   Requisition: [ ]
   Contact: [ ]
   Email: [ ]
   Phone: [ ]

   Contract Term: In this one-time purchase, or will the requested product(s) or service(s) be required on a recurring annual basis? (Check one)  Year 1: [ ]  Year 2: [ ]  Year 3: [ ]  Year 4: [ ]  Year 5: [ ]  Total: [ ]

   This form must be completed by the requesting department and must accompany all requests for sole source or proprietary purchases.

   Definitions:
   - Sole Source: A sole source procurement is authorized when there is only one source available for the product(s) or service(s) required.
   - Proprietary Requirement: A proprietary specification restricts the acceptable product(s) or service to one manufacturer or vendor. A common example would be specification by brand name which excludes consideration of approved “equivalents.” Proprietary items may be available from several distributors. If available, please attach a list of proprietary suppliers which might be used to assist in expediting this procurement.

5. Once all fields are completed, select the finish button

6. The Department Head will receive an email from DocuSign stating there is a document waiting for their approval and signature

7. Select the “Review Document” link the email

8. Select the check box to agree to agree to the DocuSign terms then select the “Continue” button

9. Department Head will review the document for approval and select “Next” which will scroll the document to the signature line and select the “Sign” icon

Note: The document cannot be edited once submitted. Please refer to the last page for tips.
10. Apply the digital signature using the DocuSign signature styles and select “ADOPT AND SIGN”

11. The signature will then be applied to the signature line and select the finish button

12. A pop up screen will show to create a “FREE DocuSign account”. Please do not create a DocuSign account, instead select “NO THANKS”

13. The document will now be sent to Procurement Services for approval

14. Procurement Services will receive an email from DocuSign stating to please sign the document (Procurement Services will only assign the document to the applicable Senior Procurement Officer)

15. The assigned Senior Procurement Officer will review the submitted form for approval and signature

16. Once approved/signed by the Senior Procurement Officer the form will be submitted to the Procurement Director

17. The Procurement Director will review and approve/sign
   a. If the dollar threshold is $500,000 or greater, the form will be sent to the Chief Financial Officer for approval and signature

18. Once the Procurement Director or Chief Financial Officer have approved and signed the document, the form will route back to the Senior Procurement Officer to apply the contract number generated by Cobblestone (ex. WM18-1234)
19. Once all required approvers have signed, all associated parties will receive an email stating that the document has been completed and will provide a link to the fully signed/approved document.

a. If an approver denies to sign at any stage of the approval flow, the document will no longer be valid and unable to be edited. The requestor will have to restart the process over again, incorporating any applicable corrections into the form.

b. It is recommended that the requestor save the answers to the questions asked on a separate word document. This will be useful in case the document is denied, avoiding retyping the answers along with making any corrections needed.

c. If additional documents need to be attached to this form, please select the attachment icon.