

## HOW TO MAKE A PURCHASE REQUEST FOR SOFTWARE

**A DEPARTMENT AGREEMENT (DA) IS REQUIRED FOR ALL SOFTWARE PURCHASES. THIS INCLUDES RENEWALS AND PROCARD PURCHASES.**

Link to the Workday Strategic Sourcing (WSS) DA Intake form: [Department Agreement Intake Form](#)

[Instructions on How to Submit a Department Agreement](#)

For questions or problems related to submitting a Department Agreement contact the [Workday Procurement Service Account](#)

- The term “software” is used universally for anything digital that could potentially contain University information via cloud storage, downloads, apps, programs, internet subscriptions, etc.
- All software purchases will need a valid “PPGG” worktag before submitting your documents for review.

### Under \$4500

1. Enter DA in WSS with quote and applicable Terms and Condition documents attached.
2. Check “Yes” to the question “Is this software?”
3. Check “yes” or “no” to the question “Is this a Pro Card purchase?”
4. Check “yes” or “no” to the question “Does this require a signature?”
5. There will be an abbreviated set of questions from Information Technology Services (ITS) and Information Security and Compliance Office (ISCO) that need to be answered to ensure compliance before any further review is completed.

### Review Process

- If the purchase amount is under \$4500 and it **DOES NOT** include Personal Health Information (PHI), Federal Education Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA) information to integrate with university systems:

The purchase will be automatically approved and will not need to be evaluated further.

- If the purchase amount is under \$4500 and **DOES** include PHI, FERPA, or HIPAA information. The purchase will continue with reviews completed by:
  - ITS and ISCO
  - Legal
  - Procurement
- If the software purchase amount is under \$4500, approved purchases may be made with your ProCard. Upon completion of the DA, you will receive an approval or denial notification via email. If the purchase is approved, you can proceed with the purchase by using a Pro Card and you will need to attach the approval notification to your monthly Pro Card reconciliation.

### **Over \$4500**

1. Enter DA in Workday Strategic Sourcing with quote and applicable documents attached.
  2. Check “Yes” to the question “Is this software?”
  3. There will be an abbreviated set of questions from Information Technology Services (ITS) and Information Security and Compliance Office (ISCO) that need to be answered to ensure compliance before any further review is completed.
- You can split the cost between multiple “PPGG” worktags.

### **Review Process**

- If the purchase amount is over \$4500, regardless of if it **DOES or DOES NOT** include PHI, FERPA, or HIPAA information the purchase will continue with reviews completed by:
  - ITS and ISCO
  - Legal
  - Procurement
- If Federal Grant speed type is used, Sponsored Programs will also review for compliance with the grant.
- Purchases over \$4500 will require a purchase order. When the DA is approved, you will need to enter a purchase requisition **BEFORE** making the purchase with the vendor.

### **Between \$50k-\$100k**

The same process is used as “over \$4500” above but requires 3-quotes. If you are unable to obtain 3-quotes, the 3-quote justification form explaining why will need to be filled out and attached to the DA. You can find that form here. [3 Quote Process](#)

### **Over \$100k**

The same process is used as “over \$4500” above but if the purchase amount is \$100,000 or more, it will need to go through the formal solicitation process (RFP or IB) or if there is only one vendor capable of providing the item or service, a Sole Source document would be utilized. If you can provide a sole source justification, please include the completed sole source justification form with the DA. If the Director of Procurement Services denies the sole source justification a formal solicitation will be needed. The sole source justification form here: [Sole Source Justification Form](#)

If you have further questions, please email [softwarepurch@louisville.edu](mailto:softwarepurch@louisville.edu).