



Purchase Card Pre-Purchase Worksheet

Complete this worksheet and document the approvals necessary prior to the use of the Purchase Card

Cardholder Name _____

Item(s) to be Purchased _____

Office Name _____

Date of Request _____

Expected Vendor _____

Requestor's Name _____

Expected Vendor's Phone # _____

Requestor's Phone # _____

Estimated Cost of Purchase _____

1. This is a Government purchase for a Government purpose.
2. This purchase is approved and authorized, in accordance with my organizational procedures and office budget coordinator, to ensure that funds are available for this purchase. (space for approvals below)
3. The amount of this purchase is within my single purchase limit (i.e. \$2,500, \$10,000 or \$25,000) and is not a split or divided purchase.
4. This purchase will not cause my 30-day limit to be exceeded.
5. I have checked the mandatory sources of supplies (e.g., General Service Administration (GSA), USPTO Office Supply Contract (CADD0), Desktop Computer contract (TIG) or surplus) for product availability. If available, I will purchase the product from the mandatory source.
6. If the purchase is over \$2,500:
 - a. The merchant is a small business. (If not, provide reason below.)
 - b. I have compared 3 vendors on the GSA schedule or obtained at least 3 quotes in the open market (Documentation attached.) If not, sole source justification is attached along with an explanation of price reasonableness.
7. If the purchase is for electronic and information technology (EIT) products, the items are compliant with appropriate Section 508 standards. (All EIT products require a completed/signed "EIT Procurement Checklist" attached to this form.) Questions should be directed to the business area EIT Coordinator or 571-272-5422.
8. If the purchase is for an accountable product over \$2,500 or a sensitive item, all pertinent information must be provided to the appropriate property custodian. (For additional information, please see the public folder under CFO News/Asset Management.)

All EIT products must be approved to operate on the USPTO enterprise baseline. If the product is not approved, it must be submitted to the Center of Excellence, Office of the Chief Information Officer (OCIO) for approval before it can be used.

A copy of all software license agreements must be provided to the Office of Acquisition Management (OAM), OCIO in Madison West, 4A51 or call 571-272-5424.

Card Holder Signature _____ **Date** _____
Signature certifies accuracy and completeness of statements 1-8 above.

NOTE: The USPTO has a microcomputer contract established for the purchase of hardware and peripherals called "Desktop Computers". If the item requested is not available on the Desktop Computer contract, you may need to obtain approval from the OAM, OCIO before purchasing the item using the Purchase Card. For additional information for ordering computer equipment, see the "Ordering Computer Equipment at the PTO" guide located in the e-mail Public Folders (Public Folders/All Public Folders/CIO News/PTOnet Office Auto/Ordering New Computers).

Include any additional comments or documentation pertaining to this purchase here:

Approvals

Approving Official (Bankcard)

Signature

Date

Budget: Approving Cost Org Manager

Signature

Date

Business Area Unique Requirements (outside of dark lines)