

TASK

Revised Date: October 1, 2021

Effective Date: March 20, 2015

Approved by: Chief Procurement Officer

Authority: LAC 34: XIII.U501.B

See Also:

PRO-U501.B.01 (Sole Source Procurements)

FRM-U501.B.01 (Sole Source Justification Form)

FRM-U501.A.03.A (Request for Quote)

TSK-U501.B.01.01 SOLE SOURCE PROCUREMENTS – PATENTED TECHNOLOGY

This task outlines the process to be followed when submitting a sole source request/justification for 'Patented Technology' to Procurement for review and approval.

Definitions:

1. *Patented Technology* – The supplier from whom the goods and/or services are to be purchased must be listed as the “Assignee” of the patent. This information is maintained by the United States Patent and Trademark Office.

Action by:

Purchasing Agent
(User Department)

Action:

1. **Completes LSU Sole Source Justification** (See FRM-U501B.01).
Sole source justification must include:
 - a. Reference the patent number from the United States Patent and Trademark Office in which the supplier is listed as the “Assignee”
 - b. Describe how the patented feature is essential and related to the department’s work
2. **Obtains** a written statement from the supplier confirming:
 - a. The accuracy of the sole source justification form, and
 - b. The supplier is the sole manufacturer and the sole distributor of the goods or services to be purchased.
3. **Obtains** a completed LSU Quote Form from the sole source supplier. (See FRM-U501.A.03.A)
4. **Obtains** a current insurance certificate from the supplier in the event onsite installation/training is required. Insurance requirements can be found at: <https://www.lsu.edu/administration/ofa/procurement/a-z-policies-procedures/insurance.php>
5. **Obtains** the following, if necessary, before submitting requisition:
 - a. Equipment operated via an electrical receptacle must have Facility Services approval via the **Facility Services Purchase Approval Form** located at: <https://www.lsu.edu/fs/files/facility-services-purchase-approval-form.pdf>

- b. Equipment being traded in must have written approval from Property Management
- 6. **Creates** a requisition itemizing goods and/or services to match supplier quote and **attaches** all required documentation.
- 7. **Submits** requisition for review, approval and issuance of a purchase order.