

**THIS COMPLETED FORM MUST BE SENT TO THE [APPROPRIATE CATEGORY MANAGER](#)
IN UNIVERSITY PROCUREMENT SERVICES**

PART I: PRELIMINARY QUESTIONS

Select a response for each question below which will assist units in assuring that the proper preliminary checks were taken prior to submitting this RFX Intake form.

University Contract. Wherever possible, the University should procure goods and services from suppliers that have active contracts in place with Rutgers. Units are advised to check RU Marketplace or contact [University Procurement Services](#).

Can the requested goods or services be provided under an existing University contract? ☐ Yes ☐ No

- If Yes, **STOP**. This form is not required.

Excess or Surplus Inventory. An excess or surplus inventory check should be done to assess opportunity to avoid purchasing new equipment and vehicles. Units should refer to the Rutgers Materials and Logistics webpage.

Has surplus equipment been considered as an alternative to this purchase by checking the [excess or surplus inventory](#)? ☐ Yes ☐ No ☐ N/A

Federally Funded. Will the unit utilize federal funds to finance this purchase? ☐ Yes ☐ No

Capital Asset. Is this a purchase of a capital asset (e.g. computer/lab equipment; vehicles; machinery; etc.)? ☐ Yes ☐ No

Independent Price Estimate. If this is a federally funded purchase, [per Uniform Guidance 200.323](#), the unit will need to complete an Independent Price Estimate prior to the issuance of any solicitation. *For further clarification and instructions refer to the [University Procurement Services webpage](#).*

Have you attached an Independent Price Estimate? ☐ Yes ☐ No ☐ N/A

- If No, why not?

PART II: SUMMARY OF RFX

Unit Name:	Commodity Code:	Date Submitted:
Unit Contact Information:	Estimate Project Value/Budget:	Type of Contract:
	\$	<input type="checkbox"/> One Time Purchase
		<input type="checkbox"/> Multi-Year Purchase
		___ No. of Years

Purpose and Intent of RFX (include or attach specifications if applicable):

The specifications must be general in nature and not specify "brand name only," unless an equivalent good or service is acceptable. Any supplier who helped develop the specification should not be included in the solicitation, nor be awarded the contract.

PART III: BIDDERS & EVALUATION COMMITTEE LIST

BIDDERS LIST. In the table below, recommend potential bidders the unit would like to include on the solicitation distribution list. Rutgers encourages supplier diversity. Small, minority-owned, woman-owned, disadvantaged, veteran-owned and Labor Surplus Area (LSA) businesses should have the maximum practicable opportunity to participate in solicitation of bids/proposals. For more information refer to the [University Supplier Diversity Program webpage](#). If the list includes a diverse or LSA bidder, check the box to the right.

Bidder Name	Contact Name	Email & Phone Number	Diverse or LSA Bidder
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

EVALUATION COMMITTEE LIST. The Evaluation Committee is responsible for objectively evaluating proposals received and providing a recommendation as to which bidder proposal is most responsive to the University needs specified in the solicitation. Provide a list of the Evaluation Committee members, along with their contact information.

Committee Member	Unit Name	Email & Phone Number

PART IV: ADDITIONAL QUESTIONS

Based upon the goods or services the unit is seeking to procure, select a response for each question below which will indicate whether University Procurement Services needs to include additional University forms and/or documents as part of the formal bid process.

Independent Contractor or Employee Determination (ICED). Is the supplier providing [professional services](#)? ☐ Yes ☐ No

**For further clarification and instructions on ICED refer to the [University Tax Services webpage](#).*

Protected Information. Will the Supplier create, obtain, transmit, use, maintain, process, or dispose of social security data, credit card data, student data, financial data, protected health information (PHI) or General Data Protection Regulation (GDPR) information? ☐ Yes ☐ No

Business Associate Agreement. Will there be an exchange of protected health information (PHI) with the supplier? ☐ Yes ☐ No

**For further clarification on the BAA refer to the [University Ethics & Compliance webpage](#).*

Third Party Risk Assessment (TPRA). Will the supplier need to use, process, transmit, store or reproduce University data? ☐ Yes ☐ No

**For further clarification on the TPRA refer to the [University Information Protection and Security webpage](#).*

Voluntary Product Accessibility Template (VPAT). Is the purpose and intent of the RFX for an electronic and information technology based purchase? ☐ Yes ☐ No

**For further clarification on the VPAT refer to the [University Office of Information Technology webpage](#).*

Facility/Construction. Is this engagement a facilities/construction-based project? ☐ Yes ☐ No

University Communications and Marketing. Will the requested goods or services require the supplier to use Rutgers logo, signature and/or mark? ☐ Yes ☐ No