



Pre-Requisition Approval Guidelines

Facilities Operations

Information Technology

Transportation

PRE-REQUISITION APPROVAL WORKFLOW

1. Approval Request: When a department identifies a need for goods or services that involve either Facilities Operations, Information Technology or Transportation, the requesting department is required to submit an evaluation request through the appropriate workflow process outlined in this document.

The requesting department should include the following in the request:

1. Contact person
2. Building & room number related to the request
3. Quotes and delivery timelines

Clear documentation is crucial to avoid delays. Please allow at least 30 days for each evaluation. If you would like to request an expedited evaluation, please contact the Campus Facility and Transportation Manager or Director of Information Security for assistance.

2. Decision: Once a decision is made, the evaluating department will email the decision to the individual that made the request or the retrieve Technology Assessment Form (TAF) will reflect a decision, whichever is applicable.

3. Requisition & Purchase Order: If the request is approved, a requisition must then be submitted. The approval email or copy of retrieve decision will serve as part of the backup for the requisition and purchase order.

Facilities Operations approval should be requested if the following applies:

- **Related to Maintenance or Repairs:** Any item or service that is intended to maintain, repair, or upgrade existing facilities, equipment, or systems that include but are not limited to; electrical, plumbing, water, gas, sewer, and low voltage (IT).
- **Involving Construction or Renovation:** Purchases that pertain to construction, renovation, or remodeling projects, including materials and services required for such activities.
- **Impacting Building Systems:** Items that may impact the building's systems such as ADA, HVAC, electrical, plumbing, fire safety, or security systems. May include but not limited to the following: Mini blinds, refrigerators, microwaves, and security cameras.
- **Specialized Equipment for Facilities:** Purchases related to specialized equipment that will be used in facilities such as tools, machinery, or other operational assets. May include but not limited to: Classroom or instructional furniture, weld booths, bleachers, or improvements to athletic fields.
- **Safety and Compliance:** Any items or services related to safety, environmental compliance, or code adherence.
- **Storage and Space Planning:** Purchases related to furniture, permanent and temporary fixtures, or storage systems that impact how space is utilized or organized within the facility.
*College furniture requests should first be vetted through the College Events Office. Central Services furniture requests should first be vetted through the Facilities Operations and Planning Office.
- **Affecting Facility Aesthetics:** Items that may influence the design, appearance, or aesthetic value of the facility, such as landscaping, interior design materials, or signage. Items that may require Division of the State Architect oversight pertaining to building remodels or anything that may interfere with path-of-travel.
- **Involving Large-Scale or Capital Purchases:** Significant purchases that require coordination or planning to ensure proper installation, maintenance, and integration with existing infrastructure.
- **Involving Disturbance to Existing Building Materials:** Such as coving, flooring, sheetrock, ceiling tiles, skim coat, pipe wrap around utilities, adhesives, and fire-retardant materials. Materials testing may be needed. Abatement fees are the responsibility of the requesting department.

Approval requests for Facilities Operations must be submitted by a Work Order (WORE) through Colleague.

Information Technology approval should be requested if the following applies:

- **IT Equipment:**
 - **New Devices:** When purchasing or receiving new equipment such as computers, laptops, tablets, smartboards, or printers, IT should be notified for setup, configuration, network integration, and security purposes.
- **IT Infrastructure:**
 - **Cabling:** Any changes or additions to the physical network infrastructure (such as wiring and cabling for connectivity) should be communicated to IT for proper installation, maintenance, and future upgrades.
 - **Support for Units:** If there are any changes or requirements for additional technical support for specific units or departments, IT should be informed to ensure resources are allocated effectively.
 - **Connection to Teaching Units:** Any new or changes to network connections for teaching units, classrooms, or labs (e.g., Wi-Fi setup, smartboard connectivity, etc.) need to be coordinated with IT.
- **IT Software:**
 - **Software Purchases:** Any new software or software licenses that need to be acquired for teaching, research, or administrative work should be communicated to IT for installation and compatibility checks.
 - **Memberships:** If the institution or specific departments are subscribing to software services or platforms (e.g., academic journals, cloud storage), IT should be informed to ensure access and security.
 - **IT Contracts:** Any contracts involving IT services, such as cloud services, maintenance agreements, or tech support, should be communicated to the IT department to ensure compliance and proper service level management.
- **Student/Employee Confidential Information:**
 - **Sensitive Data:** Any handling, storage, or processing of sensitive student or employee data (e.g., personal details, grades, employment information) should be reported to IT for secure storage, encryption, and compliance with privacy laws like GDPR or HIPAA.
- **Interaction with Access to Student/Employee Data:**
 - **Data Access:** Any changes in who has access to student or employee data, or changes in systems that allow such access (e.g., databases, student information systems), should be informed to IT to ensure proper security, role-based access controls, and audit trails.

Approval requests for Information Technology must be submitted via the Technology Assessment Form (TAF) in etrieve. Brandon Ellenburg, Director of Information Security. ellenburgb@yosemite.edu

Transportation approval should be requested if the following purchases apply:

- All Vehicles
- All Tractors
- All Trailers
- All Utility carts

Approval requests for Transportation must be emailed to Trevor Carter, Campus Facility & Transportation Manager. cartert@yosemite.edu

Purchasing

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