

PROCUREMENT REJECTION FEEDBACK FORM

For Department Use — Helps Identify and Correct Issues Before Resubmission

SECTION 1 — BASIC INFORMATION

Department: _____ Requestor: _____

_____ Email / Phone: _____

_____ Date Submitted: _____

_____ Purchase Description: _____

_____ Rejection Date: _____

SECTION 2 — REASON FOR REJECTION

(Check all that apply)

A. Budget & Funding Issues

- Budget not confirmed
- Funding source not allowable
- Insufficient funds
- Missing or unclear cost estimate
- Incorrect account/index code

Notes:

B. Vendor Requirements

- Vendor not approved or not on restricted vendor list
- Missing vendor documentation (W9, certifications, etc.)
- Vendor does not meet required compliance or diversity criteria
- New vendor onboarding required
- Vendor does not meet state or grant procurement rules

Notes:

C. Quotes & Documentation

- Required number of quotes not provided
- Quotes missing shipping, installation, or fees
- Quotes missing required compliance language
- Specifications or scope unclear
- Solesource justification incomplete
- Missing attachments (contracts, SOW, etc.)

Notes:

D. Specialized Goods & Services

- Additional technical details required
- Installation or setup requirements not addressed
- Delivery or logistics plan incomplete
- IT/Facilities approval required
- Safety/environmental review missing

Notes:

E. Workflow & Approvals

- Missing departmental approval
- Missing dean/VP approval
- Incorrect approval routing
- Required grant or state documentation missing
- Timeline conflicts (bidding, thresholds, etc.)

Notes:

F. Policy or Compliance Issues

- Purchase exceeds bidding threshold
- Conflicts with state procurement code
- Contract requires legal review
- Not compliant with grant requirements
- Risk, liability, or insurance concerns

Notes:

SECTION 3 – SUMMARY OF REQUIRED CORRECTIONS *(Procurement completes this section)*

SECTION 4 – RECOMMENDED NEXT STEPS *(Check all that apply)*

- Provide additional quotes
- Clarify specifications or scope
- Select an approved/restricted vendor
- Complete required forms or documentation
- Obtain missing approvals
- Address compliance or policy requirements
- Resubmit once corrections are made

Additional Guidance:

SECTION 5 – OPTIONAL RESOURCES FOR DEPARTMENTS

- Procurement Readiness Checklist
- Procurement SelfAssessment Quiz
- Vendor Requirements Guide
- Quote Requirements Guide

- Specialized Goods Worksheet

PROCUREMENT REJECTION FEEDBACK FORM — INSTRUCTION SHEET

For Procurement Staff

Purpose of This Form

This form provides departments with **clear, actionable feedback** when a purchase request cannot be approved. It eliminates vague explanations, reduces backandforth communication, and helps departments correct issues quickly.

When to Use This Form

Use the form whenever a purchase request is:

- Missing required documentation
- Noncompliant with policy, grant rules, or state procurement code
- Submitted with incomplete or unclear information
- Routed incorrectly
- Unable to proceed due to vendor restrictions or budget issues

The form should accompany the rejection notice or be attached directly in the procurement system.

How to Complete the Form

Section 1 — Basic Information

Fill in the department name, requestor, and key details so the department can easily identify the request.

Section 2 — Reason for Rejection

Check all applicable boxes. Use the notes field to provide **specific, actionable details**, such as:

- “Only one quote provided; two additional quotes required for purchases over \$10,000.”
- “Vendor is not on the approved list; restricted vendor required.”
- “Funding source does not allow equipment purchases.”

Avoid vague statements like “Incomplete” or “Incorrect.”

Section 3 – Summary of Required Corrections

Provide a concise summary of what must be fixed before resubmission. Example: “Please provide two additional quotes and update the scope of work to include installation details.”

Section 4 – Recommended Next Steps

Check the steps the department should take. Add any additional guidance that will help them avoid repeated rejections.

Section 5 – Optional Resources

Point departments to tools that help them prepare correctly next time (checklist, quiz, guides).

Best Practices for Procurement Staff

- Be specific and constructive
- Use consistent language across the team
- Avoid jargon that departments may not understand
- Highlight the exact policy or requirement when relevant
- Encourage departments to use the readiness checklist before resubmitting
- Keep tone neutral and supportive

Outcome

Using this form consistently will:

- Reduce repeated errors
- Shorten procurement turnaround times
- Improve communication between departments and procurement
- Increase compliance and audit readiness
- Reduce frustration for both sides