University at Buffalo

Purchasing Technology at UB

Learn about UB's technology procurement process, review outcomes, steps you need to take, and the documentation vendors must provide.

When is a review needed?

Reviews are required when a unit wishes to purchase new software, renew existing software, request add-in integration with existing services, use cloud/web-based services, or any other technology that creates, collects or processes data on the university's behalf. This requirement extends to free products or services as well as products or services developed on campus.

Why is the review needed?

All technology requests must be reviewed for compliance with state and federal regulations and SUNY and UB policies. As SUNY is responsible for the data entrusted in its possession, all vendors handling, processing, transmitting, and storing SUNY data must undergo a risk assessment to ensure all vendors are securing SUNY data in accordance with SUNY policy and industry best practice.

Technology purchases:
- can put sensitive university data at risk;
- may not meet the needs of the campus population with disabilities; and/or
- may require integration with enterprise-level applications or university systems.

Who does the review?

- Financial Management reviews for credit card processing or payments, student fees, and/or rebates or refunds to the university.
- Equity, Diversity and Inclusion (EDI) reviews for digital accessibility.
- VPCIO reviews for data security, privacy and systems integrations.
- Purchasing reviews agreements, contracts, terms and conditions.

Review Outcomes

Once all reviews are completed, the requestor will be notified if the requisition has been approved, conditionally approved or denied. The requestor will also be notified if any accessibility or security issues need to be resolved, if more information is needed, or if the contract language must be negotiated.

If more than one product or service is available that meets the needs of the department or college, the purchaser should consider the one that best meets UB's accessibility and security standards.

Exceptions

In some cases, an exception may be granted when secure or accessible products are not yet available. These exceptions are narrowly tailored, limited in duration, and should describe the method through which equally effective alternative access will be provided. You may only request an exception after the initial accessibility and security reviews have been completed. Exceptions are discouraged and should be requested only when truly necessary. All exception requests and determinations will be made on a case-by-case basis.

Understanding review decisions

- **Approved**: Product is approved for purchase.
- **Approved with conditions**: Product may be purchased, but additional action by the department and/or vendor may be required.
- **Denied**: Product purchase has been denied because it does not meet the university's standards for data privacy, security and accessibility.

Steps to complete in the technology purchase process.

1
- Identify a technology need.
- Engage with IT Support Staff to assist with identifying a product.
- Obtain departmental approval to proceed with vendor review and procurement.

2
- Determine which purchase process you need to follow and complete the appropriate pre-purchase form:
  - Under $50,000 purchase: go to Step 3.
  - Over $50,000 purchase: complete the Over $50,000 form (available from Purchasing) and submit to Purchasing, who will advise you on next steps.

3
- Complete the Under $50,000 Pre-Purchase form (available from Purchasing).
- Complete Vendor Assessment Request (VAR) with IT Support Staff. IT Support Staff will submit request and act as liaison if additional information or documentation is required for review.
- Collect required documentation from the vendor (HECVAT, VPAT).

4
- IF APPLICABLE: Financial Management reviews for payment processing, student fees, refunds, etc.
- REQUIRED: VPCIO reviews VAR for data security and risk.
  - Additional documents may be required to complete review.
  - HECVAT – Higher Education Community Vendor Assessment Toolkit provided by vendor.
- REQUIRED: EDI reviews VAR for Accessibility.
  - The vendor must provide a current Voluntary Product Accessibility Template (VPAT) / Accessibility Conformance Report (ACR).
  - Access to the product may be required for manual accessibility testing.
  - Reasonable accommodation plan may be required.

5
- Review decisions from Financial Management, EDI and VPCIO.
- Follow up with vendor if necessary.

6
- Submit your purchase request with required documentation to Purchasing.
- Purchasing will review the terms and conditions of the contract and may require additional review by legal counsel.