

Standard Operating Procedure (SOP)

Equipment Request and Approval Process

This SOP describes the **equipment request and approval process**, detailing the steps for submitting equipment requests, criteria for evaluation, approval workflows, and documentation requirements. The procedure ensures efficient allocation and proper authorization of equipment to meet operational needs while maintaining budget control and compliance with organizational policies.

1. Purpose

To establish a standardized process for requesting, evaluating, approving, and documenting equipment acquisitions within the organization.

2. Scope

This SOP applies to all employees and departments requesting new or replacement equipment regardless of funding source.

3. Responsibilities

Role	Responsibility
Requester	Completes and submits equipment request form; provides rationale and specifications.
Department Head	Reviews request for operational need and budget impact; initial approval or rejection.
Procurement/Finance	Verifies budget availability and compliance; final approval and coordination of purchase.
IT/Facilities (if applicable)	Evaluates technical and infrastructure compatibility.

4. Procedure

- Equipment Request Submission**
 - Requester completes the Equipment Request Form with detailed justification, specifications, and urgency.
 - Attaches supporting documents (e.g., quotes, product brochures).
 - Submits request electronically or in hard copy to the Department Head.
- Department Review**
 - Department Head assesses operational need, alternatives, and initial budget impact.
 - Approves or rejects the request. If approved, forwards to Procurement/Finance.
 - Returns rejected requests to Requester with documented reason.
- Evaluation & Final Approval**
 - Procurement/Finance reviews request for compliance with policies and budget availability.
 - Coordinates with IT/Facilities for technical or infrastructure input if needed.
 - Provides final approval or rejection. Authorized purchasers process order if approved.
- Documentation**
 - All forms, approvals, and supporting documents are stored in accordance with the organization's record retention policy.
 - Procurement/Finance maintains records of all equipment approvals and acquisitions.
- Notification**
 - The Requester is notified of the status (approved, rejected, pending additional info).
 - Upon arrival, equipment is inventoried, tagged, and delivered to the Requester.

5. Criteria for Evaluation

- Operational necessity and justification
- Alignment with organizational goals
- Budget availability
- Technical/infrastructural compatibility
- Compliance with procurement and asset policies

6. Forms and Records

- Equipment Request Form
- Approval workflow documentation
- Quotes, specifications, and supporting materials
- Purchase and inventory records

7. References

- Procurement and Asset Management Policies
- Budget Control Procedures
- Record Retention Policy

8. Revision/Review

This SOP will be reviewed annually or as needed to reflect process or policy changes.

Last Reviewed: [Insert Date]