

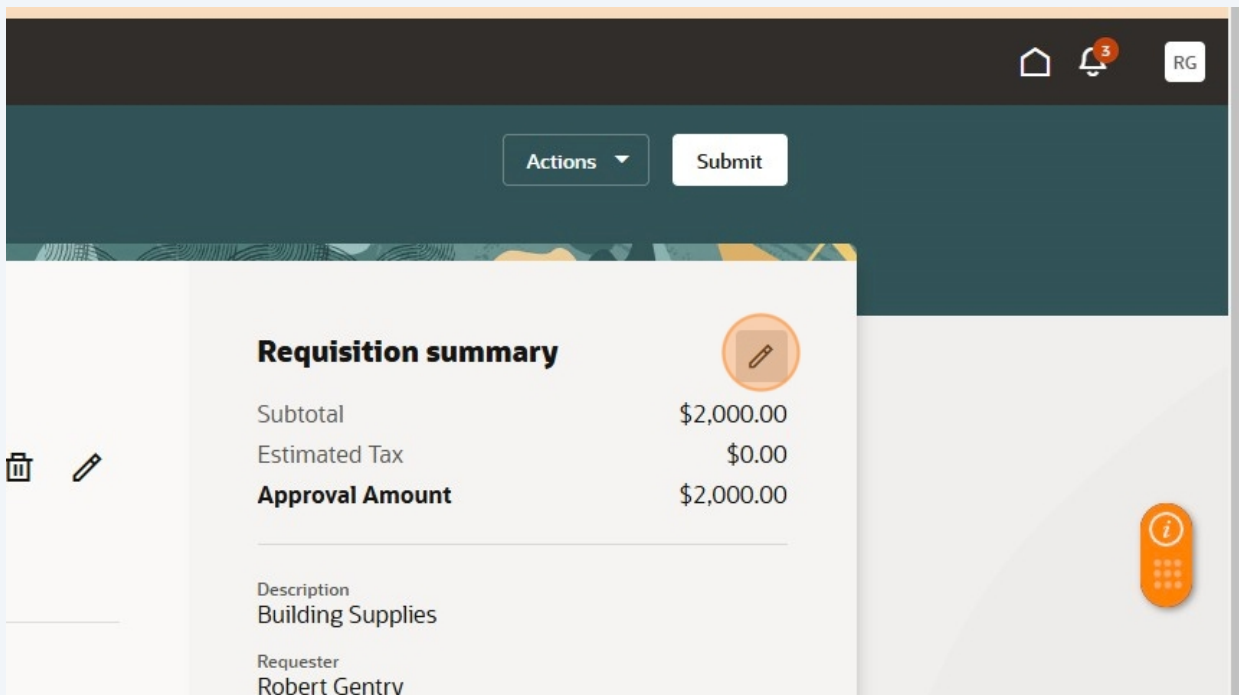
Requisition Types - Which One to Select?



Selecting a Requisition Type is required to submit a requisition successfully. This training covers each Requisition Type, when to select it, what attachments are required, and other relevant information.

1

The Requisition Type is found by clicking the "pencil/edit" icon in **Requisition Summary**.



2

Scroll down to **Additional Information**, and click on the Requisition Type drop-down box.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Cooperative Agreement



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

3 Cooperative Agreement

When do I select this option?

Select Cooperative Agreement when you plan to utilize an existing agreement with another university (example, VASCUPP) or a cooperative partner such as Omnia, Sourcewell, E&I, or TIPS.

Attachments

Attach the cooperative agreement to your requisition along with the supplier quote, and any other relevant information.

Budget Date
11/8/2024



Additional information

Requisition Type
Cooperative Agreement



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

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Sole Source- NCJ Required Attach NCJ form to transaction

Sole Source- No NCJ Required Per FI0405, NCJ form is not required

Standard Purchase- No NC 1 required Standard Purchase - No NC 1 required

4 Informal Bid

When do I select this option?

Only departments that have approval from their Campus or Institute may perform Informal Bids. Informal bids are for one-time purchases and must be awarded to the lowest cost supplier meeting specifications.

Attachments

Attach a completed bid tab, supplier quotes, and any other relevant information.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Informal Bid



Bill-to Location

Notes

Note to Supplier

5 Marketplace Catalog

When do I select this option?

Select Marketplace Catalog every time you place a marketplace order using one of the marketplace catalogs. Examples include: Dell, Grainger, Amazon, & Staples.

Attachments

Generally, attachments are not required for marketplace transactions.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Marketplace Catalog



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

6 Sole Source - NCJ Required

When do I select this option?

Select Sole Source - NCJ Required when entering a Non-Catalog Request that will exceed \$10,000 or more in spend with a specific vendor during the fiscal year and is not exempt from the NCJ requirement. To see all the NCJ exemptions, review [Policy FI0405-Procurement](#).

Attachments

Attach a completed and signed NCJ form, the vendor quote, and any other relevant documentation.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Sole Source- NCJ Required



Bill-to Location

Notes

Note to Supplier

7 Sole Source - No NCJ Required

When do I select this option?

Select Sole Source - No NCJ Required when entering a Non-Catalog Request that will exceed \$10,000 or more in spend with a specific vendor during the fiscal year and is exempt from the NCJ requirement. To see all the NCJ exemptions, review [Policy FI0405-Procurement](#).

Attachments

Attach the vendor quote, and any other relevant documentation. Please add a note to the transaction that states this transaction is exempt from the NCJ form and cite which exemption applies for Policy FI0405.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Sole Source- No NCJ Required



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

8 Standard Purchase - No NCJ Required

When do I select this option?

Select Standard Purchase - No NCJ Required when you plan to bid out the product/service, or when the total is less than \$10,000, but the vendor/department needs a PO.

Attachments

Bids - attach the RFQ or RFP/RFQ-S Questionnaire, SEAFs, vendor quotes (if available), and any other relevant information.

Non-Bids - attach the supplier quote. It's helpful to the procurement team if you include a note that the supplier or department is requesting a PO, so that we understand why a PO is being requested when it is not required.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Standard Purchase- No NCJ required



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

9 State of Tennessee Contract

When do I select this option?

Select State of Tennessee Contract when you plan to use an existing Tennessee Statewide Contract. These contracts are available for review through the State of Tennessee Central Procurement Office, [link](#), search for Statewide Contract Listing.

Attachments

Attach the statewide agreement to the requisition along with a quote from the supplier, if available.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
State of TN Contract



Bill-to Location

- Cooperative Agreement Attach a copy of the cooperative agreement
- Informal Bid Bid conducted by department in accordance with FI0405
- Marketplace Catalog Punchout catalog transaction
- Sole Source- NCJ Required Attach NCJ form to transaction

10 Sub Award

When do I select this option?

This transaction will be used by the research offices when needing to create a payable document for sub awards.

Attachments

Attach a copy of the sub award contract to the requisition.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
Sub Award



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

11 UT Contract

When do I select this option?

Select UT Contract when entering a Contract Order Form or a Purchase Agreement Order Form. All Contract Order Form and Purchase Agreement Order Form transactions have a backing contract or purchase agreement. When entering the transaction, you must enter the contract number or the purchase agreement number.

Attachments

Attachments are not required. Contract Order Forms and Purchase Agreement Order Forms do not get sent to the supplier and they are auto-approved (no workflow approvals). Therefore, attachments are not needed.

Budgetary control

Budget Date
11/8/2024



Additional information

Requisition Type
UT Contract



Bill-to Location

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction