

TIPS FOR PROCESSING REQUISITIONS

1. Ensure all pertinent information is annotated on the requisition prior to submitting, i.e. accurate chart fields, correct vendor, adequate competition, justifications, approvals, etc.
2. Ensure the item description is as thorough as possible, identifying all salient characteristics of the item or service (i.e., Monitor, Computer, Dell, Model 100, PN 643, 19" screen, etc).
3. If the requisition is a change order, please annotate " this is change order # _____ to purchase order # _____" in the description.
4. List the correct category code for the requisition. The category code will trigger the system to automatically assign a matching account number (account number can be changed if needed). In addition to account codes, the system will also assign asset profile ids for asset categories. A complete list of categories can be found at: http://www.financials.ucf.edu/helpful_resources/helpful_resources.htm
5. Multiple line items must be listed individually.
6. Select the vendor under the "Define Requisition" link. New vendors can be added by emailing pertinent info and a W-9 to purchdep@mail.ucf.edu.
7. Use Standard Comment Type: DEP (Department), Comment ID: D001 on all requisitions to provide requester information. This should be added to the "Review and Submit" link under justification/comments.
8. Ensure Departmental location is provided on the "Review and Submit" link.
9. Ensure delivery location is correct and if it is other than those listed, utilize "Modify Shipping Address" link under "Define Requisition" link.
10. Additional information should be provided within the line item comments area.
11. Attach all documentation accompanying your requisition (such as quotes and contracts) using the line 1 comment field (documents are preferred in pdf format).
12. Budget check and submit the requisition to begin the workflow process.

Most commonly needed approvals:

- ❖ Requisitions or change orders exceeding \$50,000 - V.P. and or Dean, or designee
- ❖ Request to Pay Moving Expenses - V.P. and or Provost
- ❖ All motor vehicles, watercraft or aircraft - V.P. for Admin. & Finance
- ❖ OOR approval for contracts and grant funded item(s) exceeding \$1,000. This approval is also required when individual items will work together as one and the total value exceeds \$1,000. OOR approval is needed for fund codes 21028, 21029, and 21030.
- ❖ EH&S review and approval for hazardous materials. Requisitions for toxic/hazardous chemicals must include a statement requesting the supplier to furnish Material Safety Data Sheets, which in turn must be forwarded to EH&S upon receipt by the department.