



Purchasing Services Presentation

REVIEW AND REMINDERS PERTAINING TO THE NEW
ON-LINE REQUISITION IN UT MARKET PLACE

When to Enter a Requisition:

▶ **If the Service and/or Goods is biddable, then a requisition must be entered into UT Market Place.**

➤ Steps to enter a requisition for bidding purposes:

- 1) Choose "**NON-CATALOG ITEM**"
- 2) Choose "**UNKNOWN VENDOR**"
- 3) "**INTERNAL NOTE**" is where notes can be entered & Scope of Work detailing the service required and/or model and description of good can be attached. (NOTE: Best Practice is to attach information as a Word Doc.)
- 4) In addition to attaching Scope of Work, providing a list of Companies with the following information:
 - a) Contract Name
 - b) Phone Number
 - c) E-mail Address



When is Bidding Required:

- ▶ If cost of Service and/or Goods over the life of the purchase are between \$10,000 and \$49,999.99, then Policy FI0405 requires solicitation to three (3) Vendors.
- ▶ If cost of Service and/or Goods over the life of the purchase are \$50,000 and greater, then Policy FI0405 requires solicitation to fifteen (15) Vendors
- ▶ **NOTE: Policy does not require the number of solicitations requested to be received.**



When to Enter a Contract:

- ▶ If the purchase is for Service, Software or a Good that includes Software and/or installation and the item is NOT BIDDABLE. Create a Contract and be sure to provide “Contract No-Bid Explanation.”
- ▶ If the purchase is for Service, Software or a Good that includes Software and/or Installation, then once bid is completed and award is made then a Contract is to be created and processed. Be sure to enter the “Contract Competitive Type” as Bid.



Order Types in UT Market Place

- ▶ Standard Order - one time purchase
- ▶ Informal Bid – 3 Bids Attached – total cost of purchase is between \$10K and \$49,999.99 and is a one time purchase
- ▶ Framework Order - multiple purchases over a period of time
- ▶ Sole Source Standard Attach NCJ Form – one time purchase
- ▶ Sole Source Framework Attach NCJ Form – multiple purchase over a period of time

Where to Attach Internal & External Documents

Internal Note is just as it is intend, only for end user and Purchasing Staff. If is information that the Approve may need to know or information Purchasing needs in order to process a bid. For example, Scope of Work.

External Note is just as it is intend, for information the Vendor process the order may need to know. This section replaces "Header Text" that was in Iris

Internal Note

External Note

The screenshot shows a procurement system interface with the following fields and controls:

- Transaction #:** 888469
- * Transaction Name:** 11/02/2017-11:22-Davis-NEWMAN LABELIN... [edit](#)
- User Group:** Unassigned
- Cart Originator:** Tabitha Davis
- Requester:** Tabitha Davis
- Create Date:** 11/2/2017
- Approve Arrival Date:** 11/2/2017
- Supplier:** NEWMAN LABELING SYSTEMS, INC. [edit](#)
- Total Line Items:** 11
- Total Value:** 102,968.00 USD
- Payment Form:** PO
- Order Type:** 4-Sole Source Standard-Attach NCJ Form
- External Note:** [add attachments](#)
- Internal Note:** 11/02/2017 11:22 CT Tabitha Davis - P... [edit attachments \(2\)](#)
- Purchase Order #:** 68644
- Work Order #:**
- * Asset >=\$5,000?:**
- Procurement Only:**
- * Ship To - Attn:**
- Selection:** Active
- Status:** Pending Approval
- System Note:** [History](#)
- Next Step:**
- Buttons:** Update, Approve, Hold, Reject



NCJ for Requisition vs for Contract

- ▶ When submitting a Requisition for a non-biddable item, there is a NCJ Form that needs to be filled out and attached into “Internal Note” within the requisition.
 - NOTE: Be sure to always attach the NCJ Form in the “Internal Note” of the header section.
 - DO NOT attach the NCJ Form in the first line item.

When submitting a Contract that is for a non-biddable Service, etc., there is a section titled “Contract No-Bid Explanation” within the Contract. There is no longer a separate NCJ Form for Contracts.



Certificate of Insurance

- ▶ Purchasing and Contract Services are now required to ensure if a purchase and/or service could expose a situation that could lead to a loss or claim against the University of Tennessee, then a Certificate of Insurance **MUST** be obtained prior to the purchase and/ or service begins on Campus.
- ▶ Purchasing and Contract Services will be working hand in hand to ensure the proper insurance coverages are provided by Vendor.
- ▶ Certificate of Insurance is a document that Vendors at times needs a week to obtain, so keep in mind that the good and/or service could be delayed if Certificate is not received in a timely manner.



Contractor License

- ▶ If there is a need for any of the following Services, a Contractor License is required:
 - ▶ Plumbing
 - ▶ HVAC
 - ▶ Electrical
 - ▶ Masonry
- ▶ Purchasing Services will work with department and vendor to ensure the correct Contractor License is provided.