

Creating Purchase Requisitions & Receiving (non-BuyCarolina)

- Identify what a Purchase Requisition is and when you need one
- Set up default requestor preferences
- Create a new Purchase Requisition
- Manage and edit a Purchase Requisition
- Create a Change Order Request for a Purchase Order
- Receive items/services and submit invoices
- Related policy information
- Resources that can help

What is a Purchase Requisition?

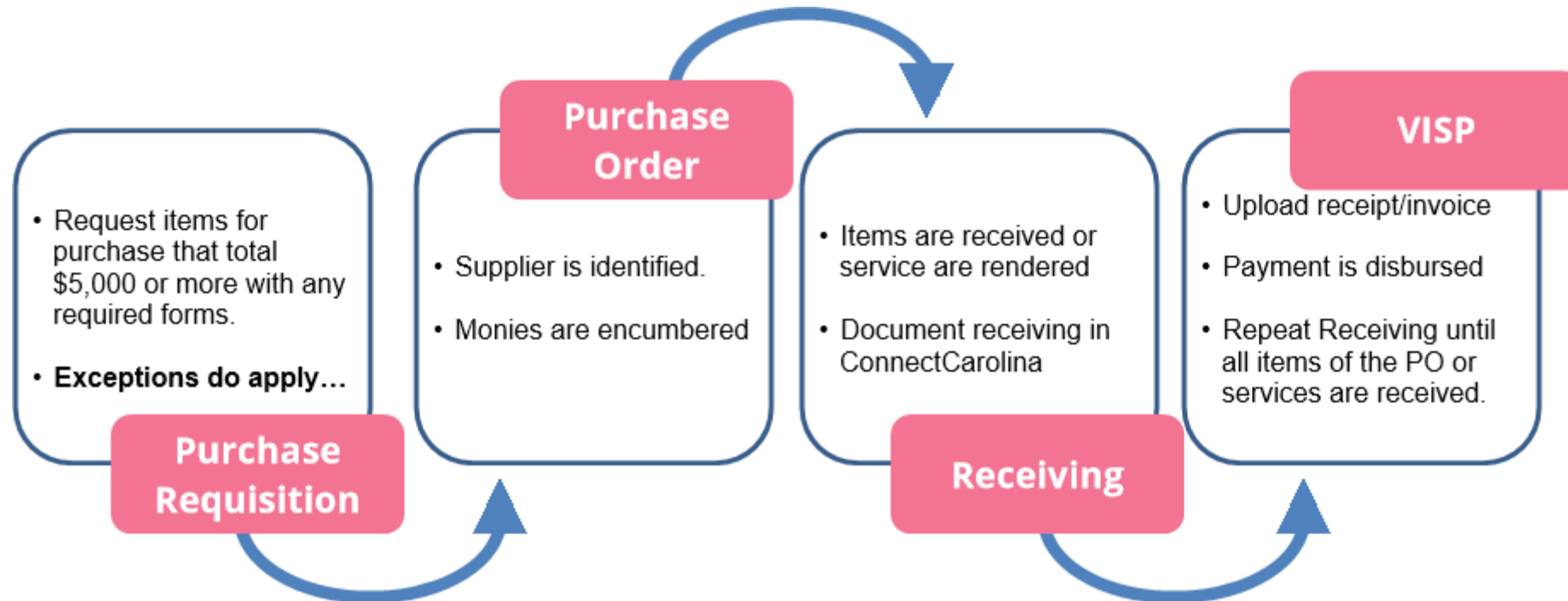


"Concentrate yourself upon the details."
~ Sherlock Holmes



When to engage with the Purchasing Agent?

Early and Often
More Purchasing Avenues
Documents Requiring Signatures



Brand Specific

This means that you need it to be a specific brand. It doesn't matter where it comes from as long as it is that particular brand.

Sole Sourced

This mean that you need it to come from a specific supplier. Only that one supplier can provide what you are looking for.

1232.1.1f – Customer Request for a Brand/Vendor-Specific Waiver of Competition

(See [1232](#) – University of North Carolina at Chapel Hill Policy on Sole Source or Brand-Specific Purchases).

This request is a (please choose one): ☐ Brand Specific or a ☐ Sole Source Request

I. Please check the appropriate justification(s) below for a waiver of competition, pursuant to the North Carolina Administrative Code ([01 NCAC 05B 1401](#)):

- ☐ 1. Where performance or price competition is not available.
- ☐ 2. Where a needed product or service is available from only one source of supply.
- ☐ 3. Where emergency action is needed.
- ☐ 4. Where competition has been solicited but no satisfactory offers are received.
- ☐ 5. Where standardization or compatibility is the overriding consideration.
- ☐ 6. Where a donation predicates the source of supply.
- ☐ 7. Where personal or particular professional services are required.
- ☐ 8. Where a particular medical product or service, or prosthetic appliance is needed.
- ☐ 9. Where a product or service is needed for the blind or severely disabled and there are overriding considerations for its use.
- ☐ 10. Where additional products or services are needed to complete an ongoing job or task.
- ☐ 11. Where products are bought for "over the counter" resale.
- ☐ 12. Where a particular product or service is desired for educational, training, experimental, developmental or research work.
- ☐ 13. Where equipment is already installed, connected and in service, and it is determined advantageous to purchase it.
- ☐ 14. Where items are subject to rapid price fluctuation or immediate acceptance.
- ☐ 15. Where there is evidence of resale, price maintenance or other control of prices, lawful or unlawful, or collusion on the part of companies, which thwarts normal competitive procedures.
- ☐ 16. Where the amount of the purchase is too small to justify soliciting competition or where a purchase is being made and a satisfactory price is available from a previous contract.
- ☐ 17. Where the requirement is for an authorized cooperative project with another governmental unit(s) or a charitable non-profit organization.
- ☐ 18. Where a used item(s) is available on short notice and subject to prior sale.

II. Funding Source: ☒ State ☐ Trust ☐ Contracts & Grants ☐ F&A