

## What to Enter in the Requisition Comments Field

Depending on what type of Purchase Requisition (PR) you are submitting you must enter specific information so your PR can be processed. Use the table below as guidance for what information to include in the Requisition Comments field based on the type of PR being submitted. Also, the Requisition Comments field is also known as Comments and/or Header Comments in ConnectCarolina and should not be confused with the Additional Information field or Line Item comments.

| New Purchase Requisitions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Chartfield Changes<br>(for Change Order Requests)                                                                                                                                                                                                                                                                                                                                                                                                                                 | Liquidations/<br>Cancellations<br>(for Change Order Requests)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Adding/Reducing Funds<br>(for Change Order Requests)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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| <p>When submitting a PR for a new requirement enter the following information in the comments field:</p> <ul style="list-style-type: none"> <li>Prior Purchase Order (PO) number for reference, if applicable.</li> <li>Indicate if a line item needs to be received by quantity or amount, if applicable.</li> <li>Supplier contact information, such as an individual's name, email, and/or phone number, if applicable.</li> <li>Departmental Contact Information.</li> <li>Any other information that the purchasing agent should know.</li> </ul> | <p>When submitting a PR for Change Order Requests related to Chartfield String changes to a PO, enter all of the following:</p> <ul style="list-style-type: none"> <li>PO number of the original PO that is requiring the chartfield changes.</li> <li>Line numbers of the PO that will be replaced with designated lines on the PR.</li> </ul> <p><b>Example:</b> <i>"Please close lines 1-3 of PO [PO number] and replace with new lines contained in the requisition."</i></p> | <p>When submitting a PR for a Change Order Request to liquidate or cancel a PO, enter the following:</p> <ul style="list-style-type: none"> <li>PO number of the original PO that needs to be cancelled or liquidated.</li> <li>Confirmation that all invoices have been paid, if applicable.</li> <li>If liquidating a PO, enter the line numbers of the PO that need to be liquidated; or enter "Liquidate entire PO." if the entire PO needs to be liquidated.</li> <li>If canceling a PO, enter the reason for canceling and provide confirmation of cancellation from the supplier.</li> </ul> | <p>When submitting a PR for a Change Order Request to add or reduce funds, enter all of the following:</p> <ul style="list-style-type: none"> <li>PO number of the original PO that needs to have funds added or reduced.</li> <li>Line numbers that need funds added to or reduced.</li> <li>Enter a justification for the reduction or addition of funds.</li> </ul> <p><b>Note:</b> This type of request should be submitted as a \$0 PR. Do not enter negative amounts in the PR.</p> <p><b>Example:</b> <i>"Please reduce Line 1 by \$5,000 to read \$10,000. This is due to a reduction in registered attendees of the event."</i></p> |

**Important:** Additional documentation may be required that is unique to your PR. This may include but is not limited to business associate agreements, confidentiality agreements (CDA), Non-disclosure agreements (NDA), trade-in documentation, and/or supplier documents requiring review and signature.

## What Attachments to Add to a Purchase Requisition

Depending on what you are looking to purchase, when submitting a Purchase Requisition (PR) you must attach additional documentation so your PR can be processed in a timely manner. Use the table below as guidance for what documents to attach.

| Supplier Quote                                                                                                                                                                                   | Waiver of Competition/<br>Sole Source                                                                                                                                                                                                                            | Data Protection<br>Checklist                                                                                                                                                                                                                                                                                                  | Contracts                                                                                                                           |
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| <p>All Purchase Requisitions must have a quote attached when submitting a new Purchase Requisition.</p> <p><b>Note:</b> The only exception is when submitting a PR for contract review only.</p> | <p>If submitting a PR for an item that can only be purchased from a specific supplier or item that is brand specific, you must attach a completed and signed copy of the <a href="#">Customer Request for a Brand/Vendor-Specific Waiver of Competition</a>.</p> | <p>If submitting a PR for software, services, or IT/medical/scientific products, you must attach a completed and signed copy of the <a href="#">Data Protection Checklist</a> to show that you have obtained the necessary approvals or attest that your purchase does not involve <a href="#">sensitive information</a>.</p> | <p>If submitting a PR for contract review only you must attach the contract. Preferable as a Microsoft Word file, if available.</p> |