REQUISITION ENTRY-MUNIS

for

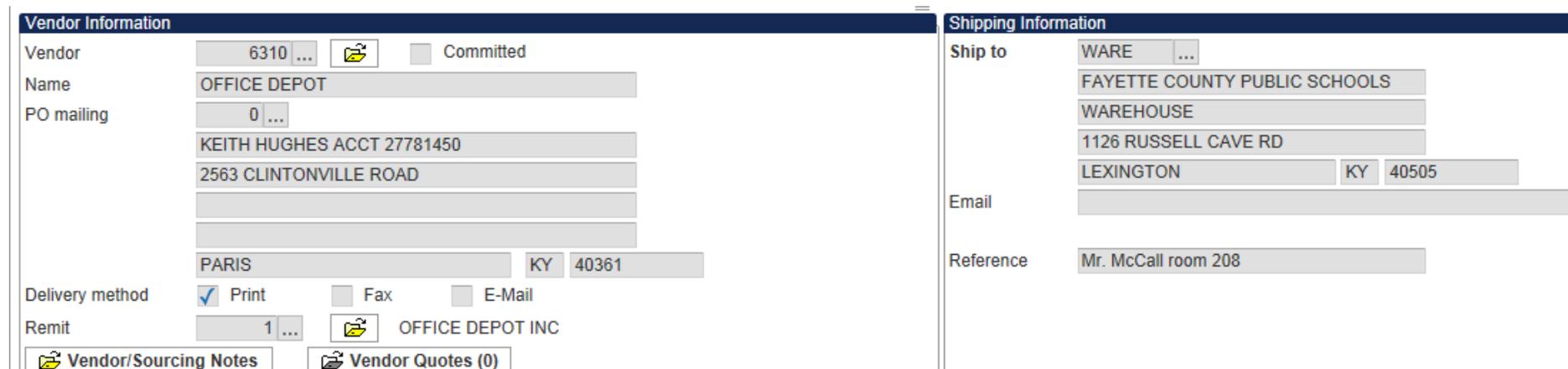## Adding Requisitions

1. Open up Requisition Entry. (All functionality is available on the ribbon at the top of the screen, as shown above)
2. Select **Add** and begin entering a new requisition by tabbing through the fields, making note of the Requisition number.
3. Add a **General description** identifying the specific purpose for the purchase.
4. Enter the **Vendor** Number or select a list of vendors by clicking on the …..

   NOTE: Use the Approved Vendor List sent each month from matthew.moore@fayette.kyschools.us

5. Select **Vendor/Sourcing Notes** to add required information for purchases equal to and over $2,500. (See Appendix A for Procurement requirements)

   NOTE: ***All PO's => $2,500.00 must have a bid #, determination # or state "lowest of 3 quotes and list the quotes"***

6. Select ➕ Add to add the notes, then Select ✅ Accept.

7. If additional notes need to be added and printed for the vendor, select ➕ Add to add the notes, then select **Print On PO, s**elect ✅ Accept.

8. Select ◀ Return to get back to the Requisition header screen.

9. Verify the **PO mailing** and **Remit** addresses (click on the yellow folder by Remit to verify the remit address). To select different addresses, click on the … to select from a list.

   NOTE: PO address identifies where the PO should be mailed and Remit address identifies where the vendor's payment will need to be be sent.

10. Verify the **Ship to** address.

    NOTE: WARE should be used for all tangible items, unless items are picked up, need assembly, or perishable, services or mileage; all of which the Ship to should be *your location*.

11. Enter any notes in the **Reference** fields and **Email** fields to identify contact or additional delivery information about the order.

12. Select ✅ Accept and add the line items of the request. Add the line Item details, specifying the Quantity, Description and Unit Price for the vendor to complete the order.

13. It is required to enter a **Commodity** only for technology items, including Toner Cartridges.

    a. Select the …. enter 310 in the **General commodity** field that appears and then select ✅ Accept.

b. A list of commodity codes will appear to select from, go to the bottom of the screen to the Filter box, select the filter button and enter a short description of the item purchased and select **Go**.

c. Highlight the item and double click on the item. The system will fill in the commodity code field as selected.
d. Replace the Description of the commodity code that appears with an actual description of the item purchased for the vendor to complete the order.

14. Click in the Org field and complete the account information associated with the order, select Accept and Add if additional lines need to be added,
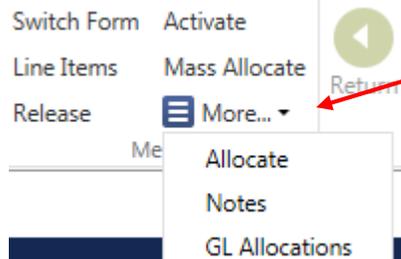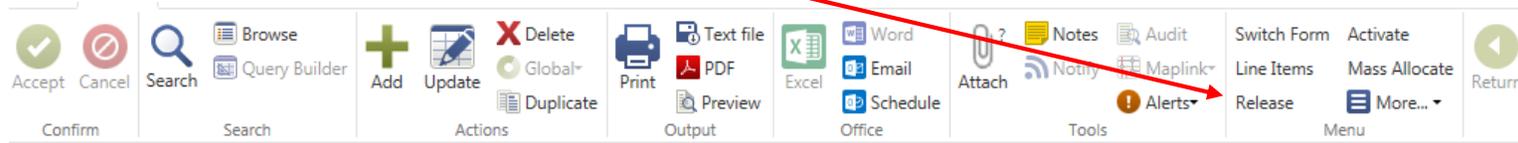
select Return once the detail lines are completed.

15. From the Requisition header screen, verify the line items amounts and Orgs/Obj/Projects by selecting **More** and **GL Allocations**, if correct, select

Return .

16. Select **Release** to send the requisition on to be approved.

17. An email will be sent stating the assigned PO# as soon as the requisition is approved and converted into a PO.

Verifying where the Requisition is in the approval process

1. From the Requisition Entry screen, find the requisition in question.

2. Select the **Approvers** button at the bottom of the screen.

3. Click on the arrow for the Step that has a status of In Progress to determine the person who has the pending approval.

Rejected Requisitions

If you receive an email that a req. has been rejected

1. Go to Requisition Entry

2. FIND the requisition # referenced in the email or search for a requisition with Status= **1**

3. Select the **Approvers** button

4. Notice the Approver' comments for the reason of the rejection as shown below.

5. Select **Update** to make the required changes and ✓ **Accept** to complete the change.

6. Select **Release** to resubmit the requisition for approval

For a true emergency purchase order being needed as an exception ONLY & not the norm

Please follow the steps below to expedite your requisition to a purchase order promptly after financial services has checked all of the applicable coding:

a. Contact your principal/budget manager/director and inform them that you have a need for an emergency purchase order and let them know that you will need for them to approve   immediately for you.

b. If your Principal/budget manager is not available, please ask their back-up for approval.
    (NOTE: Everyone should have a back-up in place)

c. If the back-up is also not available please contact Rodney Jackson, Tiffany Davis or Becky Riley in Financial Service via email with your principal/budget manager/director copied to approve the requisition for you.

d. Finally, contact Vanessa McCall, Paula Marshall or Rob Elam to convert and process your requisition.

APPENDIX A

Procurement Requirements

- If the aggregate amount to be purchased is less than $20,000.00 (small purchase procedures) and the item is not available via price contract, the following procedures shall be followed:

- Purchases less than $2,500.00 – Use best effort to obtain the lowest price from a responsible and responsive bidder for the supplies, services or construction to be purchased

- Purchases equal to or exceed $2,500.00 but less than $20,000.00 – the following procedures shall be followed:

  - A minimum of three (3) potential suppliers shall be solicited for quotes. At least one (1) potential supplier must be a certified MBE or WBE (see Non-Competitive Purchases if quotes cannot be obtained)

  - Between $2,500 and $10,000 - telephone or catalog quotes are acceptable. At least one (1) potential supplier must be a certified MBE or WBE (See Non-Competitive Purchases if quotes cannot be obtained) A file shall be maintained indicating the quoted price, vendor, contact name, date of quote and other information obtained. Small Purchase Quote Form should be used. Requisition/PO shall include the statement that the purchase is the "lowest of three quotes" and the vendor names and quotes must be included on requisition.

  - Between $10,000 and $20,000 – A minimum of three (3) written quotes shall be solicited from potential bidders or suppliers. At least one (1) potential supplier must be a certified MBE or WBE (See Non-Competitive Purchases if quotes cannot be obtained) The requirement of written quotations may be dispensed with if time does not permit the submission of written quotations, providing that the quotation is subsequently verified in writing by the bidder. The requisition/purchase order shall include the statement that the purchase is the "lowest of three written quotes" and the vendor names and quotes must be included on requisition

Important Things to remember:

- ***All PO's over $2,500.00 <u>must have a bid #, determination # or state "lowest of 3 quotes and list the quotes"</u> These should be listed in the <u>"vendor/sourcing notes"</u>***

- ***If the purchase is a "sole source" and the PO will be over $2,500 then a determination form must be filled out and signed to get a determination # assigned if the vendor is not an Approved Vendor. <u>Writing "sole source" on the PO will not be acceptable</u>. Sole Source means that the vendor is the only place the items or services are available.***

- All forms are on the [purchasing website](#)

- Questions concerning the procurement process or about vendors should be directed to Mattew.moore@fayette.kyschools.us Purchasing Technician for Fayette County Public Schools or call him at (859)-381-3885.