

REQUISITION TYPE METHODOLOGIES

The chart below outlines the different Workday Requisition Types and the methodologies for each. Refer to <https://www.montclair.edu/procurement/forms/> for any referenced forms (all are bolded).

In all cases, the quote (or contract, if applicable) must be attached to the requisition and must be referenced on the requisition, preferably in the “Memo to Suppliers” field.

Please select the most applicable requisition type. For example, even if a requisition is under \$7,000, if the good/service is under a University Contract, BOT Waiver of Advertising, or one (1) of the four (4) Cooperative Contract methods, please select that applicable requisition type. This guidance applies to all requisition types.

| Requisition Type | Methodology |
|---------------------------------------|--|
| Under 3 Quotes Threshold | Used for purchases that are under the quoting threshold of \$7,000 (\$0 - \$6,999.99). A minimum of one (1) written quote is required. |
| 3 Quotes | Three (3) quotes are required when the total cost is between \$7,000 to under the bid threshold of \$35,500. All three (3) quotes must be attached to the requisition. Refer to the Competitive Quote Form for additional guidance. |
| University Contracts (UNC #) | A publicly Advertised Request for Proposal over the bid threshold of \$35,000, issued through Procurement Services. The RFP # must be referenced on the questionnaire and on the requisition (memo to suppliers). |
| BOT Waiver of Advertising | <p>A Waiver of Advertising over the bid threshold of \$35,500 that is not publicly advertised, issued through Procurement Services or delegated to the Using Department. All Waivers of Advertising must be approved by the BOT or the delegated approver (Vice President for Finance & Treasurer or President) depending on the value, through Procurement Services. Must meet one of the 33 statutory waivers to public bidding, as listed in the Procurement Policies and Procedures. The Waiver # must be included on the questionnaire and on the requisition (internal memo).</p> <p><i>Note: BOT approval is required for all procurements over \$500,000, regardless of procurement method. If the procurement method was a publicly Advertised Request for Proposal (University Contract) or a Cooperative Contract, that applicable requisition type should be selected. For example, if a University Contract is over \$500k and required a BOT Waiver please select the “University Contracts (UNC #)” requisition type. In all cases, please include the BOT Waiver number on the requisition on the Internal Memo field and again on the questionnaire.</i></p> |
| New Jersey State Cooperative Contract | Contracts awarded by the State of New Jersey that the University can utilize. Refer to https://www.montclair.edu/procurement/cooperative-purchasing-contracts/ for additional information (Type 1). The Cooperative Contract Name (New Jersey State Contract) and # must be referenced on the requisition (memo to suppliers) and on the questionnaire. The Cooperative must be referenced on the quote. Any additional support documentation (such as additional quotes) must be attached, as applicable. |

REQUISITION TYPE METHODOLOGIES

| Requisition Type | Methodology |
|--|---|
| Federal GSA Cooperative Contract | Contracts awarded by the Federal Government that the University can utilize. Refer to https://www.montclair.edu/procurement/cooperative-purchasing-contracts/ for additional information (Type 2). Cooperative Contract Name (Federal GSA Contract) and # must be referenced on the requisition (memo to suppliers) and on the questionnaire. The Cooperative must be referenced on the quote. Any additional support documentation (such as additional quotes) must be attached, as applicable. |
| New Jersey Purchasing Agreement Cooperative Contract | Contracts awarded by New Jersey entities that the University can utilize. Refer to https://www.montclair.edu/procurement/cooperative-purchasing-contracts/ for additional information and a list of currently approved entities (Type 3). Cooperative Contract Name and # must be referenced on the requisition (memo to suppliers) and on the questionnaire. The Cooperative must be referenced on the quote. Any additional support documentation (such as additional quotes) must be attached, as applicable. |
| Nationally Recognized Cooperative Contract | Contracts awarded by National entities that the University can utilize. Refer to https://www.montclair.edu/procurement/cooperative-purchasing-contracts/ for additional information and a list of currently approved entities (Type 4). Cooperative Contract Name and # must be referenced on the requisition (memo to suppliers) and on the questionnaire. The Cooperative must be referenced on the quote. Any additional support documentation (such as additional quotes) must be attached, as applicable. |
| Sole Source | Used when only one (1) supplier is capable of providing a good or service. The Sole Source Form along with any additional support must be attached to the requisition. |
| Emergency Procurement | Used in situations when the health, safety, welfare, or critical economy and efficiency of the University or its property requires an emergency procurement. The Emergency Procurement Form must be completed and attached to the requisition. |
| Punch-Out Catalog | Used for contracts that punchout to the supplier's on-line catalog website through Workday. Many of these punchouts are listed at https://www.montclair.edu/procurement/supplier-contracts/ . <i>Note: Please select the "Punch-Out Catalog" requisition type for any punchout/on-line catalog order, even if it is related to a University Contract RFP, BOT Waiver, or a Cooperative.</i> |