UNIVERSITY OF BALTIMORE

Operational Procedure

Document Number: 001 – FY2020, Requisition Directive and Change Order Request

Created August 21, 2019   **Created by** Beth Kirk, Procurement Director

Revised   February 4, 2026

Procedure Frequency: For each purchase requisition and change order request submitted.

Who is involved in the procedure? The requesting department/divisional representative and/or Business Manager.

Policy

The Board of Regents approved the University System of Maryland (USM) Procurement Policies and Procedures. At UB, the Director of Procurement is authorized to develop procedures to ensure compliance with these Policies and Procedures.

Purpose of the Procedure

To ensure the appropriate documentation is submitted for every purchase requisition entered into Workday, which facilitates timely and accurate processing and the change order request process.

Procedure

Each time a business unit/department submits a purchase requisition, the following procedures apply:

(1) For all requisitions for goods or services, **a quote and/or contract** must be attached/uploaded to the requisition to include a note/comment where the contract is attached if the contract needs to be signed. **An approved Requisition is required prior to the review/execution of any Contract and the creation of a PO.**

   NOTE: ALL IT SOFTWARE AND HARDWARE purchases MUST be reviewed and approved by OTS prior to entering in a Req. Submit your IT Procurement Review Request via the link: Service - IT Procurement Review (teamdynamix.com)

(2) All requisition must include the following specifications:

   a. supporting documentation: Quote/Contract/Proposal (New Contracts that need to be signed must be attached, please include a comment in the "internal comments" if a contract requires execution)
   b. Memo Line comment: Avoid entering any information in this field that may need to be changed later. Updating this field triggers an official change order for the Purchase Order.
   c. attach IT's TDX email approval as a PDF attachment (if applicable)
   d. description of the item or service requested

e. information regarding delivery requirement
f. vendor id
g. dollar value
h. UBalt's POC information (full name, email address and/or phone number) in the Description or Line Comment or Add Comments' sections, and
i. any other pertinent/required information, per the Workday Job Aid

Workday Requisition Job Aid: WDFIN_Requisition-Event_FINAL 05012024.pdf

Note:

- Some IT related (IT security sufficiency) requisitions may route to IT for IT security sufficiency approval. This approval is in addition to the IT Procurement Review approval required and noted above.

- External/Supplier comments will print on the PO, this field is limited to approximately 8 lines.

- The Deliver To/Ship To Address will default to the Mailroom, you must change it each time if you want to change the Ship To Address to one of the five authorized UBalt addresses.

(3) For all requisitions for technology (desktops, laptops, etc.) the faculty/staff the technology is being purchased for and the exact location the technology will be located must be included in the requisition.

(4) All vendor contract/agreement which the University must sign, must be attached/uploaded to the requisition. The requisition must also include the vendor's POC information (full name, email address, and phone number). Remember, only Procurement is authorized to sign purchasing agreements on behalf of the University per USM Procurement Policies and Procedures, Section E.1, Page 38.

(5) For requisitions over $25,000 for which there is only a sole source vendor, the business unit/department must attach a Sole Source Justification along with an explanation of the reason for the specific request.

(6) Requisitions that include food and drinks should include the names of the attendees or a general description of the attendees, per the Food Policy. If the list is not finalized an explanation of who will be attending, and the purpose of the event must be included with the requisition. Keep in mind AP may require a list of the attendees at a later date.

(7) Take into consideration the detailed timelines (below) when submitting requisitions.

(8) New Vendors/Suppliers. Contact Mary Matthew in AP. AP will required the vendor's updated, fully completed, and executed W9 if they are not in Workday.

(9) POs will not be emailed to UBalt staff, all POs can be located in Workday by searching "Find Purchase Order."   If the PO needs to be emailed to the vendor, the Requester must include the vendor's email address in the "internal comments" section of the req.   in the internal comments section of the requisition, for example "Email the PO to XXXXX@xxxx.com".

(10) Ensure your requisition fees/line are in accordance with the contract fees/cost and term. If you need assistance with how to structure our requisition, contact a Buyer for assistance.

(11) Change orders are initiated by "Creating a Request", complete the form per the Workday Job Aid and include supporting documentation.

Processing Times

The Office of Procurement processes requisitions using the following timelines:

1. For requests **$25,000** or less which do not utilize an existing University System of Maryland (USM), State of Maryland or other cooperative agreement, allow **five (5)** to **seven (7)** business days for processing.

2. All catering requests, not on Contract, must be submitted at least **seven (7)** business days prior to the event. Depending on the contract and event size more time may be required to review the contract.

3. For requests which utilize an existing USM, State of Maryland or other cooperative agreement, allow **five (5)** to **seven (7)** business days for processing (excluding Task Order Request for Proposals utilizing the Maryland State Department of Information Technology Contract).

4. For requests over **$25,000** and less than **$200,000** utilizing simplified procurement method (Request for Quote), allow **fourteen (14)** to **twenty-one (21)** business days for processing.

5. For Task Order Request for Proposals utilizing Maryland State Department of Information Technology contract, allow for up to **ninety (90)** days.

6. For procurements over **$200,000** which do not utilize an existing USM, State of Maryland or cooperative agreement or any dollar value request which will be handled by a Request for Proposal (RFP) or Invitation for bid (IFB), processing times may vary. However, assume **six (6)** to **nine (9)** months. The timeline will be established by Procurement in partnership with the requesting Department.

NOTE:

▪ A vendor is **ONLY** authorized to provide a good or service over $5,000 via an authorized Purchase Order issued by the Procurement Department. Verbal commitments issued to vendors by the Departments are not permissible as this violates USM Procurement Policies and Procedures and puts the vendor at risk of not being paid.

- To ensure the timely processing of requisitions, all backup documentation (i.e., quotes, contracts, leases, forms, etc.) **MUST be attached/uploaded to the requisition and not sent to the Procurement staff via email. This includes multi-year contracts and exercised renewal options. A Procurement Officer will reach out to obtain more information, as needed.**

- It is prohibited to intentionally split orders to avoid procurement procedures as this is a violation of the USM Procurement Policies and Procedures and does not promote competition**.**

- Units should follow their internal (Divisional) pre-approval process before initiating this Procurement Business Process.

- Federally funded POs will require a debarment and suspension verification, which may impact the completion of the PO. Procurement may also require a debarment and suspension verification for all $25k or more POs.

- Minority Business Enterprise (MBE). We encourage you to reach out to MBE firms when sourcing/selecting qualified vendors. Visit the link below or reach out to Procurement for assistance.

  [Maryland DOT - Certification Management System (mdbecert.com)](mdbecert.com)
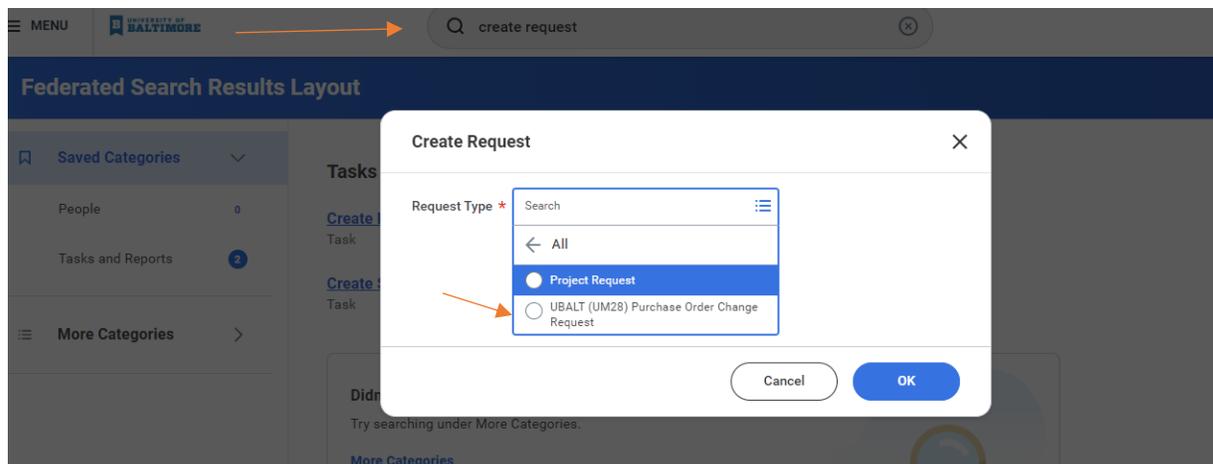
- All Furniture must be procured via Maryland Correctional Enterprises (MCE), unless Procurement obtains a waiver from MCE.

  Click here to view the [MCE Catalog](#)
  Click here to obtain a copy of the MCE Waiver: [MCE Waiver Request Form 2023_81123.docx](#)

Change Orders

1. Initiate a "Create Request," select "UBalt Purchase Order Change Request."

2. Complete the questionnaire. Ensure you thoroughly explain the change order details and explain your request by providing the reason for your change and the lines/fields that need to be changed. Attach new information/documentation pertaining to the change, this may include but not limited to an updated quote or amendment.
3. If the request is approved the Buyer will change the PO and "approve" the request. You will receive a Workday notice.
4. If the request is denied the Buyer will deny/reject/send back the request with an explanation. You will receive a Workday notice.
5. If more information is required, the Buyer may also inform the Requester via Workday by sending the request back. You will receive a Workday notice.
6. Procurement may cancel or close the existing PO and advise the Department to enter a new requisition.
7. Change Orders will route to all Driver Worktag Managers.
8. To review/look-up your requests go to your "Request" App. and click on "My Requests."
9. Also, go to Procurement's SharePoint site to view the Change Order Request Report: [Change Order Request Report](#)

Close a Purchase Order

Complete a Change Order Request to initiate the closure of a Purchase Order. Be sure to include an explanation of the circumstances that require the PO to be closed before it has been fully paid/expensed.

Changing the Requester's Name on Purchase Orders

Contact your Procurement Point of Contact/Buyer to request the modification of the Requester's Name for applicable Requisitions.

*Requisition and Change Order timelines may vary based on dollar value, complexity of procurement, additional approval(s) required, missing/required paperwork and the need to negotiate terms and conditions.