



# January 2022 Best Practice Reminders

## • Oracle Requisitions

- Budget should be confirmed prior to requisition entry. Should funds require transfer between accounts, a budget adjustment request should be submitted. Details on this can be found at the below training link.
  - [Budget Adjustments](#)
- Prior to entering a requisition for a new vendor, the vendor must be added to Oracle. Requester should request vendor to fill out the [Vendor Registration Form and Form W9](#). After vendor has, it should be emailed directly to [accountspayable@hvlnc.gov](mailto:accountspayable@hvlnc.gov) (while also copying [purchasing@hvlnc.gov](mailto:purchasing@hvlnc.gov) in the email) and requesting the vendor to be added.
- Due to a functionality issue with Oracle, for requisitions, the “Quantity” field should encompass the \$ amount of the purchase/contract. The “Price” field should always be a value of “1” and will be treated as the “Quantity” field.
- All background quotes related to a requisition should be attached to the requisition. This includes both from the selected vendor as well as the comparison quotes from other vendors.
- Utilize [this spreadsheet](#) for locating appropriate GL codes for your requisitions. Should you deem the appropriate code for your requisition not to be included in the spreadsheet, reach out to [purchasing@hvlnc.gov](mailto:purchasing@hvlnc.gov) and provide relevant background details.

## • Forms

- When utilizing the new [PO Quote Form](#), be sure to provide a thorough explanation if criteria is selected in either the “Single Brand Convenience” or the “Waive Competition” sections. For instructions on those sections, view the three training videos below.
  - [PO Quote Form](#)
  - [Single Brand Convenience](#)
  - [Waiving Competition](#)
- Formal Quotes and Informal Bid requests require use of the “[Formal Quote Request Form](#)” and “[Informal Bid Request Form](#)”. For details on these requirements, view the below training video and view the [new Purchasing Policy Manual](#).
  - [Formal Quote Request Form](#)
  - [Informal Bid Request Form](#)

## • Historically Underutilized Business

- It is a priority for the City to contract with HUB vendors. Per NC General Statute 143-128.4, these vendors are defined as being at least 51% owned by one or more persons who are members of at least one of the groups listed below.
  - Black
  - Hispanic
  - Asian American
  - American Indian
  - Female
  - Disabled
  - Disadvantaged
- In an attempt to prioritize use of Historically Underutilized Businesses, a [COH Professional Services HUB Vendor List](#) has been added to the Procurement HUB. All HUB vendors listed for each category should be provided with an announcement of any particular solicitation. Additional categories are planned to be added over time. Requesters are free to add additional HUB vendors in announcements as well.
- Additional efforts are in process to prioritize use of these valued businesses.