

## **Instructions for completing the online Purchase Requisition form**

The online requisition form is very similar to the “old” paper copy. The new form can be completed on your computer and printed for funding and signing by the person responsible for the funding source and forwarding to the Purchasing Department.

REMINDER: The purchase requisition is the internal document necessary to begin the procurement process. A requisition is necessary for all purchased products/services except for purchases done with the Procurement Card. Note that a requisition identifies a need. A purchase order is the *legal document* which fulfills that need. As such, this requisition form is NOT to be sent to any vendor for any reason.

- Requisition Number: This section is now blank. Feel free to use your own numbering system to track your department’s requisitions. If you don’t want to create a system, perhaps just using a date system would be helpful for tracking purposes.
- Approved by (Budget Authority) and Date: The person who has signing authority for the funds noted on the requisition will sign and date the form here once it is completed and printed. Purchase requisitions **must** be approved by the appropriate budgetary or signing authority before Purchasing can act on the request.
- Requisition total dollar value: Enter the total cost of all items, including any shipping charges.
- Date of Requisition: Enter the date that the requisition is completed.
- Department Charged: Enter the name of the department requesting the goods or service.
- Requested by: Enter the name of the person completing the form.
- Telephone #: Enter the telephone extension number for the person completing the form.
- Date Required: Enter the date that the goods or services are to be delivered to the end user. Please remember to allow for standard processing time within the Purchasing Department and for order filling and shipping time from the vendor. If there is a critical need, please note so clearly on the form in the item description field.
- Deliver to: Enter a complete internal address for delivery by our Receiving Room personnel.
- Document Text: Enter here any special notes regarding issues like special delivery instructions, quote numbers, etc.
- Contract Award Number: If applicable (and known) enter the state or CCSU contract award number here.
- Does Price Include Delivery: Check appropriate box if the price(s) indicated on the form include delivery to CCSU or not.
- Item Number: This reflects the number of line items listed on the req form. The on-line form only has room for five line items per form. Please use additional copies or attached sheets for more than five items.
- Quantity: Amount of each item requested.
- Unit: Describe how the items are packaged and/or will be sent (i.e. each, box, carton, lot)
- Description: Provide complete information on the product or service being requested. If possible, include a manufacturer name and model number. Note that the font size in this section will automatically adjust to accommodate as much information as you wish to include. If a vendor quote, product brochure, catalog page, or anything else that describes the item is available, please note “see attached” and staple a copy of references information to the req.

- Banner Index: Where the money is coming from. These can be listed here and/or below in the Account Distribution box.
- Unit Price and Extension: Cost per each, box, carton, etc and cost for all items on that line.
- Total: Includes all extension amounts and any additional charges for shipping, etc.
- Vendor Section: Please complete as much as possible. If certain information is not known or available, Purchasing can fill in the blanks once we get the req. If competitive prices were obtained, include that information here also. Do not combine commodities that are to be purchased from different vendors. Separate purchase requisitions should be prepared for each individual vendor. Similar items from the same source can and should be grouped together on the same requisition.
- Account Distribution: Use this box if more than one Banner Index is being charged for the purchase. The indexes can be split by percent or by amount. If the Account Subcode is unknown, please leave that line blank. We can fill it in for you.

Once the form is completed, please forward it along with any attachments to the Purchasing Department. We will verify that the form is complete and that the information regarding the requested purchase is current and accurate, and make adjustments and fill in the blanks as necessary. Note that if we identify any significant increase in total cost due to things like outdated vendor quotes, omitted shipping charges, mathematical errors in calculating the extension costs or req totals, we will seek authorization from the department before proceeding with processing a purchase order.

As always, if there are any questions, please call Purchasing at x22530

9/21/04