

**SECTION: Business Affairs/Purchasing**  
**SUBJECT: Instructions for Completion of Purchase Requisition and Sample Form**

**ISSUED BY:** Office of Business Affairs  
**REPLACES:**  
**APPROVED BY:** Vice President for Business Affairs and Treasurer  
**EFFECTIVE DATE:** February 1998

#### Instructions for completion of purchase requisition

Requisitioned items or services fall into different categories, each with its own expense classification. They are: contractual items, commodities, printing, equipment, and capital expenditures. Each expense classification must be submitted on a separate requisition. Requisitions containing a mixture of equipment, commodities, or contractual services will be returned to the initiating department with a request to prepare separate requisitions.

When comparing items of supply and suppliers, prime consideration should be given to the recommended source which will give the best quality commensurate with need. Consideration should be given to the service, quality, timing, and price in that order. The requisitioning department is responsible for verifying that the vendor will accept a Purchase Order.

Purchase of **computer equipment, software, or computer peripherals** requires the approval of the **director of information services**. **Office equipment or office furniture** requires the approval of the **purchasing manager**.

Costs for shipping and handling are an important part of many purchases and should be included on the Purchase Requisition.

The numbers listed below correspond with the numbers shown on the sample Purchase Requisition form on page 2 of this document.

1. The exact budget number to which the order is to be charged.
  - a. If applicable, provide the revenue account number that offsets expenses.
2. The signature of the person having authority for the specified budget account.
3. Date of the request for a Purchase Order
4. The complete name, address, and zip code of the suggested vendor. It is important that items from a common source be listed and that a requisition not include several items which must be purchased from a variety of vendors.
5. The quantity or unit accurately described i.e., Case, Box, Dozen, Gallons, Quarts, Each, etc.
6. The supplier's item number with reference to the catalog source when available i.e., page 75, GF Business Furniture, Vol.1, 1992, if required by the vendor.

7. Complete description and/or specification of the items or services requested, for example:  
ammonia (4 gal./case)  
liners, 55 gal. (100/case), 2mil.
8. The cost per unit.
9. Total cost (quantity times unit cost).
10. Total cost of the entire order.
11. & 12. For use by the Accounts Payable Office.

**The yellow copy is retained for departmental files and the white copy forwarded to the Accounts Payable Office.**

**SAMPLE FORM ONLY**

## PURCHASE REQUISITION

VENDOR NAME _____ <b>4.</b> ADDRESS _____ CITY, STATE, ZIP _____	REQUEST DATE _____ <b>3.</b> RETURN PO TO _____	
ACCOUNT NO. _____ <b>1.</b>	AMOUNT _____	APPROVAL SIGNATURE _____ <b>2.</b>
REVENUE NO. (IF APPLICABLE) _____ <b>1a.</b>		
<b>ALL FIELDS REQUIRED</b>		<b>ALLOW 72 HOURS FOR PROCESSING</b>

QUANTITY	PART NO.	DESCRIPTION	UNIT PRICE	TOTAL
<b>5.</b>	<b>6.</b>	<b>7.</b>	<b>8.</b>	<b>9.</b>
		SHIPPING AND HANDLING		
<b>TOTAL</b>				<b>10</b>

**Purchase orders are not required for purchases under \$1000 with the following exceptions:**

► **Requisition for ANY computer equipment, software or computer peripherals?**

Must obtain Director of Information Services approval: \_\_\_\_\_ Date: \_\_\_\_\_

***Attach this pre-approval to invoice when submitted for payment***

► **Requisition for office furniture or office equipment costing more than \$250?**

Must obtain Purchasing Manager approval: \_\_\_\_\_ Date: \_\_\_\_\_

***Attach this pre-approval to invoice when submitted for payment***

► **Purchase Order is required by vendor**

FOR USE BY

ACCOUNTS PAYABLE: **11.& 12.**

VENDOR NO.		REQUISITION NO.	
P. O. NO.		DATE APPROVED	