



## PURCHASE REQUISITION FORM INSTRUCTIONS

Requests for the purchase of supplies, services and equipment may be initiated on this form. In addition to self-explanatory information, the following basic information must be provided.

1. **Banner Requisition Number:** This field is only used when the purchase requisition document is associated with a purchase requisition that has been completed in Banner (FPAREQN). If applicable, enter the Banner requisition number in this field.
2. **Date:** Enter the date the requisition is being submitted to the purchasing department.
3. **Ship To:** Enter the requesting department name and full address to which the order is to be delivered.
4. **Department Phone Number:** Enter the phone number for the requesting department contact person who is responsible for gathering and providing any additional information that the procurement department may need to process the order.
5. **Date Items Needed:** Enter the desired delivery date in this field. Do not use A.S.A.P., be realistic and specific. Allow time for processing by Procurement and handling/shipping by vendor.
6. **Ship Via:** Enter the method of shipping/delivery you'd prefer or is required.
7. **Vendor:** Enter the Vendor's Banner ID number and complete mailing address. If the vendor doesn't have an existing Banner ID, request a W-9 from the vendor and send the completed W-9 along with your requisition to Procurement Services. Note: UAS has a substitute W-9 form that is preferred to be used for collecting the tax information for a vendor, and is available for download at the UAS Business Office website.
8. **Suggested Suppliers:** If the procurement requested is greater than \$10,000.00 and competition must be sought, then list the name and address of the suggested suppliers you wish to be included in the competitive procurement process.
9. **Complete Description:** A description of the item(s) must be sufficient to identify both to procurement personnel and prospective vendors the exact item(s) desired. This may include catalog numbers, manufacturer and model number, size, color, voltage, weight, etc.  

Requisitions for subscriptions, or for services or supplies for a period of time, shall cite the period the purchase order is requested to be valid ("Beginning (Beginning Date) through (Ending Date)"). Please note that funded blanket purchase order periods may not cross fiscal years.
10. **Quantity:** Indicate how many units are desired.
11. **Unit:** Enter the unit of measure used for the quantity requested. Do not use package, case, carton, box, etc., unless you state in the line item text the number of each in the unit container.
12. **Unit Price:** Enter the price per unit measure entered in the "Unit" field.
13. Enter the estimated freight cost if freight (Shipping and Handling) is not included in the unit price of each line item, and is to be paid as a separate line item.
14. **To Be Used For:** Enter the end use/purpose of the item(s) and name of person to receive the department copy of the purchase order.
15. **Accounting Fields:** Complete account numbers is required. If more than one account will be charged, the item numbers or portions of the aggregate total to be charged to each account must be specified.
16. **Federal Grant or Contract Number:** Enter the associated Federal Grant or Contract number, if any.
17. **Action Requested:** The appropriate "Action Requested" block must be selected.
  - a) Routine purchase order request.
  - b) Indicate "Procurement Card" when requesting that an order be paid with a Procurement Office credit card or are otherwise documenting credit card use approval.
  - c) "Check Request" is used when no purchase order will be issued, such as for some subscription renewals or conference registration fees that are paid by check.
  - d) Indicate "Cash Pay P.O." when the check must accompany the purchase order (RESTRICTED USE-Normal payment terms are Net-30).
  - e) "Brand Name Only" is used when only one brand will satisfy the University's needs. A complete justification must be attached detailing the reason that the restrictive procurement is necessary.
  - f) "Sole Source" is used only when there is only one place to procure the goods and services. A full justification must be attached that details the reason and also verifies that the price is fair and reasonable, and explains the basis for that price reasonableness determination.
  - g) Emergency procurements may be made only when there is immediate demand caused by conditions over which the department has no reasonable control. Justification must be attached. If a purchase order number has been provided in advance, that purchase order number MUST be entered on the purchase requisition. If immediate action is necessary to protect the public health, welfare, safety, or public or private property, the senior University official at the site of the emergency is authorized to purchase supplies or services as necessary to resolve the immediate need and mitigate continuing damage or threat. The individual on site or the department official shall contact the procurement department as soon as possible to apprise the procurement officer of the situation. If the emergency occurs after hours, notification shall be made the following business day.
  - h) If the Purchase Requisition is a request for a modification (change) to an existing purchase order, check the "Modification" box and list the existing purchase order number in the space provided.
18. The requisitioning person must sign and date.
19. A person who is authorized to commit the departmental funds being used for the procurement must sign as "Approved By". By signature on the purchase requisition, the authorized signer is approving the procurement and certifying that property has been screened for campus/statewide availability as required by University Property Regulations. Procurement Services maintains signature cards for all UAS authorized signers/accounts.