How to fill in a Purchasing Requisition

Procurement Services
Revised August 2008
How to fill in a Purchasing Requisition

The Purchasing Requisition form (or “Requisition”) is the document that initiates the process of creating a Purchase Order.

The Requisition is the means by which the end-user communicates its needs to Procurement Services.

The Purchase Order created is a formal contract between York University and a particular supplier of goods and services that includes terms and conditions and payment details.
Purchase Orders are issued by the Procurement Services Department. Any purchase of goods and/or services in excess of $10,000 requires the use of a Purchase Order. Departments are required to provide at least 3 written quotations with the Purchasing Requisition for acquisitions under $50,000. Procurement Services is responsible for competitively bidding acquisitions over $50,000.

The only exception to the rule is when there is a preferred supplier and/or a Standing Agreement for a good or service. If this is the case, Procurement Services has negotiated terms and conditions with a supplier for best value and therefore additional quotations are not necessary.

These quotations can be solicited by the end-user or by Procurement Services (see Policy/Procedure for applicable dollar thresholds).
Prospective suppliers are required to provide all pertinent details as suggested in the online tutorial “How to Request Written Supplier Quotations”.

The University Policy and Procedure on the Procurement of Goods and Services (revised June 2007) as well as the Purchasing Requisition form are located on the Web site at: http://www.yorku.ca/finance/services/procurement/

There are two identical requisition forms, a one-page form and a two-page form for convenience. The form can be filled in electronically or manually but must be approved and signed by the appropriate signing authority.
The **date** is automatically generated in the top left hand corner when the form is opened.

The **requisition number** is automatically generated. This is the reference number to track these expenses on eReports.

The Purchasing Requisition can be returned to Procurement Services via internal mail, by fax or by email.
The end-user can **suggest a supplier** or can leave it blank to allow Procurement Services to assign a supplier.

Procurement Services will advise the end-user if a more suitable supplier exists outside of the suggested one or if York University has a preferred supplier.

**Suppliers Quote/Competitive Bid No.** - links the supplier quote and its details or the Competitive Bid number that was assigned by Procurement to the Purchasing Requisition (if applicable).
The end-user is required to provide the actual **ship to information/delivery address** so that the order will be delivered expeditiously.

The **Contact** is the person who is expecting the delivery. Completing this information completely will ensure that the supplier receives accurate information for the shipment of the good.

<table>
<thead>
<tr>
<th>Ship To Information</th>
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</thead>
<tbody>
<tr>
<td>Contact:</td>
</tr>
<tr>
<td>Extension:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
<tr>
<td>Dept Name:</td>
</tr>
<tr>
<td>Room No:</td>
</tr>
<tr>
<td>Building:</td>
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</table>
Purchasing Information

**Purchase Type** is in reference to the type of purchase this requisition is initiating. This allows Procurement Services to verify the order and its details against policies, procedures and SOP's properly.

**Purchase Frequency** is in reference to how often will the good or service be purchased and paid for over a period of time. This information allows Procurement Services to determine the appropriate type of Purchase Order to create based on the Departments needs.
**End Use** is in reference to the actual use of the product to be purchased and will allow Procurement Services to determine the appropriate tax application. Options are: administrative, teaching, research or resale.
Purchasing Information

If the Purchasing Requisition is initiating a change to an existing PO, the original PO number must be noted.

Indicate the date that delivery is expected. The date is required to ensure timely delivery. The supplier will deliver based on this date.

PO is required for purchase of ALL Radioactive Materials, any value. A Radioisotope permit number is required.

When describing isotope, provide the activity (unit of measure). For example, 500 uCi.

Requestor faxes the requisition to the Radiation Safety Officer (55491) for approval, who then forwards it to Procurement Services for processing.
# Quantity (QTY), Unit of Measurement (UOM) and Description

<table>
<thead>
<tr>
<th>Quantity</th>
<th>UOM</th>
<th>Description of Item</th>
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</table>

**Quantity** - Requires input of the quantity of the good/service.

**UOM** - Requires the Unit of Measurement (e.g., each, box, lot). For example, case contains 24 items, the end-user indicates 24 in quantity field and “each” in UOM field.

**Description of Item** - Briefly describes the goods or services being acquired, ALL RELEVANT information must be provided to ensure appropriate terms and conditions are applied on the Purchase Order.
**Chartfield Distribution**

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Cost Centre</th>
<th>Activity</th>
<th>Time</th>
<th>Location</th>
</tr>
</thead>
</table>

**Account** - Describes the nature of the purchase, whether it be office supplies, or a new computer. Requires a 6-digit code from the Chart of Accounts.

**Fund** – Indicates the nature of the activity engaged in by the end-users’ area. Requires a 3-digit code, normally used in conjunction with the Cost Centre.

**Cost Centre** - Departments, units, organizations, projects, grants, courses or programs. Requires a 6-digit code and identifies an area of responsibility.

**Activity** - Tracks courses/seminars/projects/scholarships or identifies specific transactions within a Cost Centre or an Account. Optional field, requires 6-digits.*

**Time** – Describes when an activity is held or revenue or expense was incurred. Can be a day, month, session, calendar year or fiscal year. Requires a 5-digit code, can be alpha or number code or combination of both.*

**Location** - Refers to a place internal to the University or its satellites or an external location. Describes where an activity is held or revenue or expense was incurred. Requires a 5-digit code.**

*must contact Finance to set up
**must contact Finance for external, Facilities for internal
**Unit Price** – Requires the price for each unit of measure. Not mandatory if suppliers’ quotations are attached. If Procurement Services is asked to source the product, the end-user leaves blank.

**Extended Price** - “Quantity” multiplied by “Unit Price.” If price is provided, extended price will be calculated automatically and appears on the Requisition.

<table>
<thead>
<tr>
<th>Unit Price</th>
<th>Extended Price</th>
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<td></td>
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</table>
**Taxes and Totals**

<table>
<thead>
<tr>
<th>Subtotal *</th>
<th>PST</th>
<th>GST</th>
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<tbody>
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</table>

**Sub Total** - Automatically calculated and sub-total will appear on the Requisition.

**P.S.T. and G.S.T.** - Both fields have a drop down menu selection to identify if the tax is applicable or not or if it's unknown. The selection will assist Procurement Services in determining and applying the correct tax to the purchase.

*Total price including applicable taxes will be reflected on the Purchase Order*
Freight and Additional Requirements

Freight – A line has been added specifically for freight. When applicable, an account, fund and cost centre must be allocated to freight charges. If freight does not apply, the details of the line should be left blank.

Free-form” that allows for additional necessary information. Procurement suggests that important information such as grant numbers be entered here.

If the item(s) being ordered is perishable please indicate in this field. Indicating this will help ensure that the item is shipped properly and in a timely manner.

Payment terms net 30 days is the University standard and may only be changed with the approval of Procurement and Finance.
**Department Authorization** – the Cost Centre Owner must authorize and sign the Purchasing Requisition.

**Additional Approvals** – based on the Signing Authority Register, additional approvals may be necessary depending on the value and nature of the purchase. Where applicable, the additional authorized person must sign the Purchasing Requisition.
The next step is to return one copy to Procurement Services at fax 55630, by email to purchase@yorku.ca or to Suite B, EOB.

Once the Purchasing Requisition is complete and verified, a Purchase Order is created. Procurement Services will fax it to the supplier and forward a yellow copy to the contact person. This yellow copy is referred to as the receiving copy.

One time Purchase Order (General) – When goods/services are received, and meet required needs, the Community forwards signed yellow receiving copy to Accounts Payable. Signed yellow copy approves release of payment. If a partial payment is required a copy of the PO must accompany the invoice and the invoice must state partial payment. The yellow receiving copy should accompany the final invoice and final payment should be noted. The Community must print name, title and sign the Purchase Order.

Multiple purchases/payments over the fiscal (Blanket) – The Community verifies that the charges are correct, notes the PO number, signs and returns the invoice copy to Accounts Payable, for payment. With the last payment, the green copy of the PO must be attached.

Multiple purchases/payments over many years (Project) - The Community verifies that the charges are correct, notes the PO number, signs and returns the invoice copy to Accounts Payable, for payment, and attaches a copy of the PO. With the past payment, the purple copy of the PO must be attached.

If you have any questions regarding the requisition, you can contact Procurement Services at ext 55143 or at purchase@yorku.ca.
Other Online Tutorials

Procurement: The Basics
How to Request Written Supplier Quotes