

Strategic Procurement

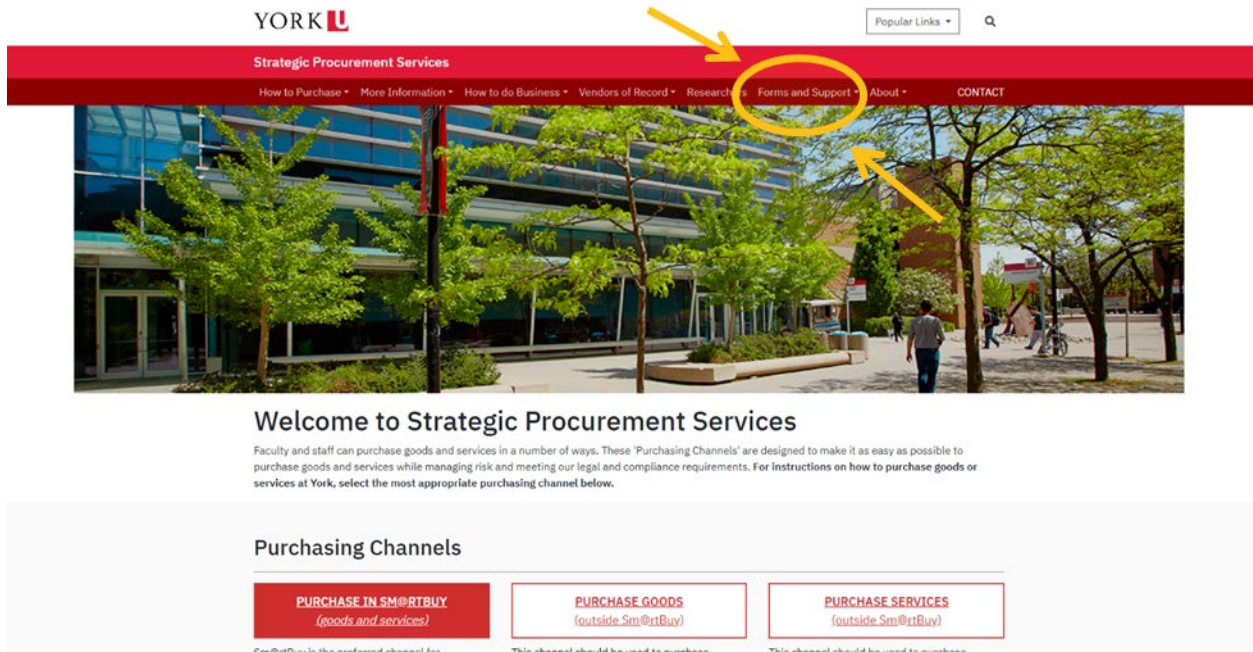
How-To Fill & Submit a Purchasing
Requisition Form

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Step One:

From the Strategic Procurement website, click the **Forms and Support** header.



The screenshot shows the top navigation bar of the Strategic Procurement Services website. The 'Forms and Support' link is circled in yellow, and a yellow arrow points to it from above. Another yellow arrow points to the 'Forms and Support' link from the right. Below the navigation bar is a large image of a modern building with green trees in front. Below the image is the heading 'Welcome to Strategic Procurement Services' and a paragraph of text. Below that is the 'Purchasing Channels' section, which contains three buttons: 'PURCHASE IN SM@RTBUY (goods and services)', 'PURCHASE GOODS (outside Sm@rtBuy)', and 'PURCHASE SERVICES (outside Sm@rtBuy)'. The first button is highlighted in red.

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Strategic Procurement Services

How to Purchase * More Information * How to do Business * Vendors of Record * Research * **Forms and Support** * About * CONTACT

Popular Links * 🔍

Welcome to Strategic Procurement Services

Faculty and staff can purchase goods and services in a number of ways. These 'Purchasing Channels' are designed to make it as easy as possible to purchase goods and services while managing risk and meeting our legal and compliance requirements. For instructions on how to purchase goods or services at York, select the most appropriate purchasing channel below.

Purchasing Channels

PURCHASE IN SM@RTBUY <i>(goods and services)</i>	PURCHASE GOODS <i>(outside Sm@rtBuy)</i>	PURCHASE SERVICES <i>(outside Sm@rtBuy)</i>
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Step Two:

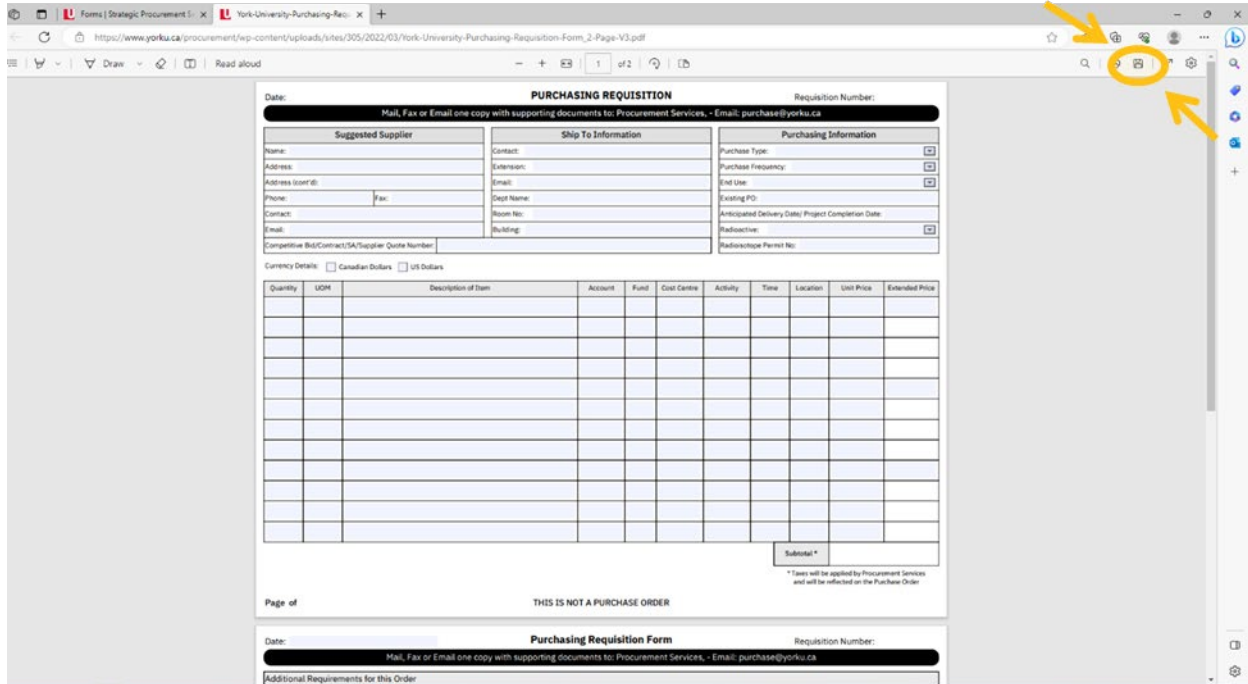
Under Forms, choose **Purchasing Requisition** subheading and click on the Purchasing Requisition Form. The form will open in a new tab on your browser.

The screenshot shows the 'Strategic Procurement Services' website. A red navigation bar at the top contains the following links: 'How to Purchase', 'More Information', 'How to do Business', 'Vendors of Record', 'Researchers', 'Forms and Support', 'About', and 'CONTACT'. Below the navigation bar is a list of service categories, each with a red '+' icon on the right. The categories are: 'Declaration of Surplus', 'Limited Tendering & Non-Application Approval (formerly Non-competitive Procurement)', 'PCard Change Request', 'PCard Participant Application & Agreement', 'Performance Evaluation & Engagement Renewal for Licensed Professionals', 'Purchasing Requisition', 'Travel & Expense Visa Card Employee Application', 'Vendor Evaluation Survey', and 'Vendor Quote Solicitation'. The 'Purchasing Requisition' category is highlighted with a red background and a red '-' icon on the right. Below this category is a table with three columns: 'FORM', 'REQUIRED SIGNATURES', and 'FORM PURPOSE'. The 'Purchasing Requisition Form' is listed in the 'FORM' column. A yellow circle highlights the text 'Purchasing Requisition Form' in the 'FORM' column. A yellow arrow points from the 'Purchasing Requisition' category header to the 'Purchasing Requisition Form' entry in the table. Another yellow arrow points from the 'Purchasing Requisition Form' entry to the text '(If you have difficulty viewing the form in your browser, please download and open the form in Adobe Reader)'. The 'REQUIRED SIGNATURES' column lists: 'Cost centre owner;', 'Director or EO if value between \$50K to \$199,999;', 'AVP or dean if value between \$200K to \$499,999;', 'Divisional VP between \$500K to \$999,999.', and 'AVP Finance if value between \$ 1 Million to \$4,999,999.'. The 'FORM PURPOSE' column contains the text: 'This form is used to initiate the process of creating a Purchase Order (PO)'. Below the table are the remaining categories: 'Travel & Expense Visa Card Employee Application', 'Vendor Evaluation Survey', and 'Vendor Quote Solicitation', each with a red '+' icon on the right.

FORM	REQUIRED SIGNATURES	FORM PURPOSE
Purchasing Requisition Form (If you have difficulty viewing the form in your browser, please download and open the form in Adobe Reader)	Cost centre owner; Director or EO if value between \$50K to \$199,999; AVP or dean if value between \$200K to \$499,999; Divisional VP between \$500K to \$999,999. AVP Finance if value between \$ 1 Million to \$4,999,999.	This form is used to initiate the process of creating a Purchase Order (PO).

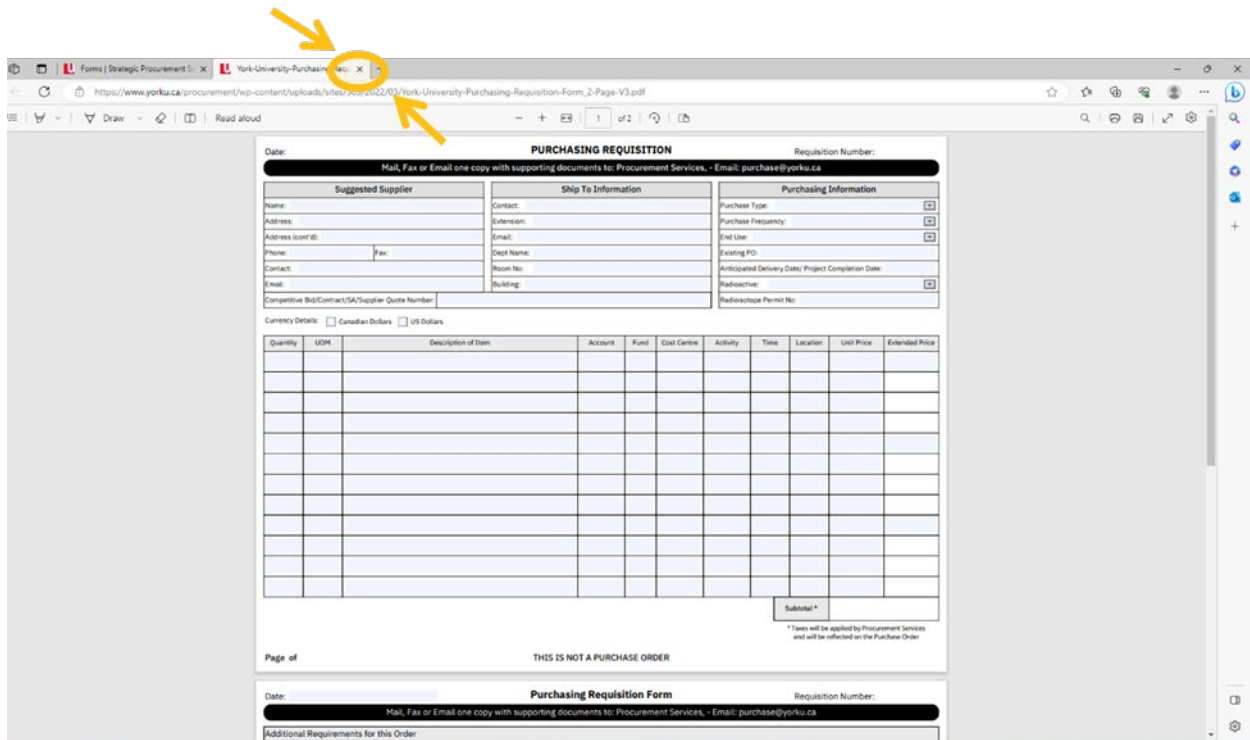
Step Three:

Once the form opens in the new browser tab, **download** the form as a **PDF File** to your **desktop**.



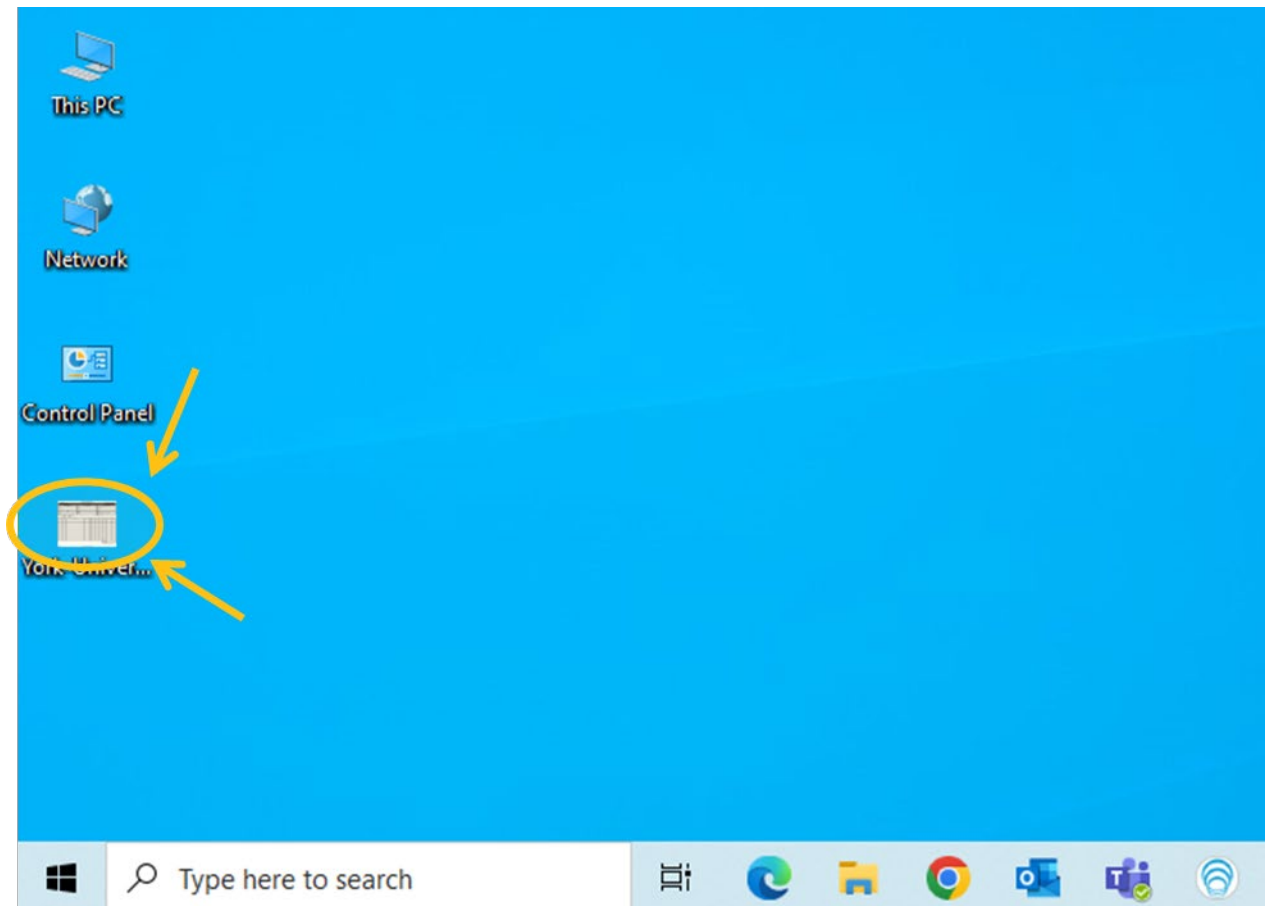
Step Four:

Once the PDF file has been saved to your desktop, **close** the previously opened browser tab.



Step Five:

Open the newly saved PDF file from your **desktop**.



Step Six:

*Once opened, the **Date** and **Requisition Number** will automatically be generated each time the form is opened. This is for tracking and auditing purposes and is **required** for all Purchasing Requisition forms that are submitted.

Fill out the Purchasing Requisition form completely:

- **Suggested Supplier section** (Vendor information)
- **Ship To Information section** (York Contact information)
- **Purchasing Information section** (if you are filling out a Change Order, please also include the Purchase Order Number under 'Existing PO').
- **Currency Details**
- **Quantity, Description of Item(s), Unit Price and the full Account/Fund/Cost Centre information for each line.** Once these fields have been filled out, the **Extended Price** and **Subtotal** will automatically be generated.

The screenshot shows a web browser window displaying a 'PURCHASING REQUISITION' form. The form is titled 'PURCHASING REQUISITION' and includes a 'Requisition Number' field with the value '687374117'. The form is divided into several sections: 'Suggested Supplier', 'Ship To Information', 'Purchasing Information', and 'Currency Details'. A central area is labeled 'Fill in Sections'. Below these sections is a table with columns for 'Quantity', 'UOM', 'Description of Item', 'Account', 'Fund', 'Cost Centre', 'Activity', 'Time', 'Location', 'Unit Price', and 'Extended Price'. A 'Subtotal' field is located at the bottom right of the table. Annotations include red circles around the 'Date' field (6/21/2023), the 'Requisition Number' field, and the 'Subtotal' field. Red arrows point from boxes labeled 'Automatically generated' to these fields. Yellow circles highlight the 'Suggested Supplier', 'Ship To Information', and 'Purchasing Information' sections. A yellow oval highlights the table headers. A yellow arrow points to the 'Fill in Sections' label. The form also includes a footer that reads 'THIS IS NOT A PURCHASE ORDER'.

Date: 6/21/2023 Requisition Number: 1687374117

Purchasing Requisition Form

Mail, Fax or Email one copy with supporting documents to: Procurement Services, - Email: purchase@yorku.ca

Additional Requirements for this Order

Payment terms net 30 days

Send Copy of PO to:

Check the box if PO has to be sent to Vendor

Check the box if Goods are coming across the border

Additional information for change orders

Check the box if reapproval is required

Reapproval will be required under the following conditions

1. Change orders in which the increase in cost exceeds the original cost by lesser of 5% or 250,000
2. Approving authority specifically states that reapprovals are required for any increase in cost
3. Change orders in which the increase in cost pushes the contract value into higher approval threshold

Department Authorization I hereby certify that I am authorized to sign on the cost centres above and all the expenditures are valid, in compliance with the policies of the university, and sufficient funds are available to cover this expenditure.				Procurement Services Use Only																					
Cost Centre Owner Printed Name _____ Cost Centre Owner Signature _____ Date _____				Change Order %:																					
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 15%;">Additional Approvals</th> <th style="width: 20%;">\$50,000 - \$199,999</th> <th style="width: 20%;">\$200,000 - \$499,999</th> <th style="width: 20%;">\$500,000 - \$999,999</th> <th style="width: 25%;">\$1,000,000 - \$4,999,999</th> </tr> <tr> <td>Signing Authority</td> <td>Director or Executive Officer</td> <td>Assoc./Asst. Vice President or Dean</td> <td>Divisional VP</td> <td>President or Vice President Finance and Administration</td> </tr> <tr> <td>Printed Name</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Signature</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>				Additional Approvals	\$50,000 - \$199,999	\$200,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 - \$4,999,999	Signing Authority	Director or Executive Officer	Assoc./Asst. Vice President or Dean	Divisional VP	President or Vice President Finance and Administration	Printed Name					Signature					Other Info:	
Additional Approvals	\$50,000 - \$199,999	\$200,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 - \$4,999,999																					
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Printed Name																									
Signature																									
				Approval(s):																					

Page of THIS IS NOT A PURCHASE ORDER

On Page 2 of the Purchasing Requisition form, fill out the **‘Additional Requirements for this Order’** and **‘Additional Information for Change Orders’** sections.

Once complete, the form must be signed and dated by an **authorized cost centre signee** (under the **‘Department Authorization’** section at the bottom of the form).

AND (if applicable):

If the purchase request falls under the \$50,000-\$199,999 threshold:
The Director/Executive Officer of the cost centre must sign.

If the purchase request falls under the \$200,000-\$499,999 threshold:
The Associate/Assistant Vice President or Dean must sign.

If the purchase request falls under the \$500,000-\$999,999 threshold:
The Divisional VP must sign.

If the purchase request falls under the \$1,000,000-\$4,999,999 threshold:
The President or Vice President Finance and Administration must sign.

Step Seven:

Once complete, please save a PDF copy and submit to purchase@yorku.ca along with any associated documents (quotes, email conversations, approvals, etc.) for processing.