

# Foothill-DeAnza Community College District

## How to Complete a Purchase Requisition (form 23260)

### **I. Introduction**

The Purchase Requisition is a three-part form, and it is pre-numbered in the upper right corner. It is not an order. Instead, it is a form that is used to ask District Purchasing Services to make a purchase. District Purchasing Services issues and signs a District Purchase Order when it makes a purchase. Purchase Orders are contracts. Purchase Order numbers are not the same as Purchase Requisition numbers.

If you need a supply of Purchase Requisitions, please order them from District Purchasing Services by filling out a Stores Requisition (form 23480). If you need a few forms to get you started, please contact the Budget & Personnel Office at DeAnza, the Educational Resources & Instruction Office at Foothill College, or District Purchasing Services.

### **II. Procedure**

1. Only list items together on a requisition if you believe that they can all be purchased from the same type of vendor. If they cannot be purchased from the same type of vendor, please request them on separate Purchase Requisitions. For example, do not list a car and a computer on the same Purchase Requisition.

2. Begin to fill out the Purchase Requisition in the upper right corner by writing the following information in the spaces that are provided: today's date, the date delivery is required, the name of the person who should receive a copy of the District Purchase Order after it is issued, and your campus name (Foothill, DeAnza, or Central Services). Also in this area of the form, fill in the spaces that follow "Deliver Materials to," including Building, Room No., and name of recipient. If you need more space to specify complete delivery information, write it in the "Give Complete Description" area of the Purchase Requisition or refer to it in that area and attach another page with more information.

3. In the upper left corner of the Purchase Requisition, there is a blocked out area "For Purchasing Use Only." Please leave this area blank.

**However**, please do recommend one or more vendors whom you would like Purchasing Services to contact for a quotation by writing the contact information in the "Give Complete Description" area of the Purchase Requisition. Please include the company names, addresses, phone numbers, and sales representative names when known. If you need more space, please refer to and attach a list of recommended vendors.

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4. In the body of the Purchase Requisition, there is an area with the following headings: “Quantity, Unit, Give Complete Description, Estimated Unit Cost.” Under these headings, write the quantity you want of each item, the unit of issue (such as each, package, case, or dozen), the description, and the estimated cost per unit of issue.<sup>1</sup>

Writing a description, which is also known as a “specification,” can be simple for low cost items or quite complex for high cost items. Whenever possible, describe each item in terms of its functions, features, and characteristics and then follow this with the name of a product that you know will satisfy these requirements (manufacturer’s name and the model number or part number). If requesting services, describe the type, frequency, and duration of service.

If you need additional space, please refer to and attach an additional page.

NOTE: There are two columns to the left of this area that are marked “For Purchasing Use Only,” please leave those areas blank.

### **Special Requirements when requesting Open Purchase Orders:**

- Specify the beginning date and ending date of the requested Open Purchase Order. The most common term begins upon the date Purchasing Services issues the Open Purchase Order and ends on June 30 of the current fiscal year.
- Specify as accurately as possible the dollar amount of purchases that you expect to make against the Open Purchase Order during its entire term. Purchases against the Open Purchase Order will not be allowed to exceed this amount.
- If you are requesting an Open Purchase Order so that you can purchase supplies or maintenance services on an as needed basis from a vendor throughout the fiscal year, indicate “Open P.O.” as part of the description. In addition, it is important to specifically describe the items that you will purchase frequently (this will enable Purchasing Services to obtain lower prices for those items).
- If requesting an Open Purchase Order in order to pay an Independent Contractor, include this information as part of the description, and attach the properly completed Independent Contract form to the Purchase Requisition. If the Independent Contract amount exceeds \$20,000.00, (refer to Board Administrative Procedure 3140), indicate the date that the Independent Contract was approved or ratified by the Board of Trustees.

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<sup>1</sup> If the Purchase Requisition is asking for a revision to an existing Purchase Order, use this area to describe the desired revision and include the relevant Purchase Order number. Explain why the revision is necessary. Include or attach a quotation or letter from the vendor if goods, services, and/or the Purchase Order amount will be increased or decreased (this is not necessary for some Open P.O.’s for supplies.) If the Purchase Order being changed is for a Public Project, attach a copy of the properly authorized construction Change Order. Call Purchasing Services in advance if you need assistance.

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- Specify the name, address, and phone number of the person to whom invoices should be sent by the vendor or contractor. The specified person will: (1) Ensure that each invoice matches the Open Purchase Order that it references; (2) Price audit each invoice against the Open Purchase Order on contract, and obtain corrected invoices from the vendor or contractor as necessary; (3) Ensure that the correct Open Purchase Order number appears on each invoice; and (4) Sign off on each appropriate invoice as “approved for payment” before sending it to District Accounts Payable for processing.

5. Complete the lower left section. Indicate the correct name in “Requested By.” Fill out the account number and object code information to indicate which account will pay for the purchase. **VERY IMPORTANT:** Obtain the signature of each Budgeter on the Purchase Requisition for each account number that is listed. By signing the Purchase Requisition, the Budgeter certifies that funds are available to pay for the purchase, and the Budgeter authorizes District Purchasing Services to make the purchase with those funds.

In addition, obtain the signature of the District Grants Monitor if the purchase will be paid for with grant funds, and obtain a signature from the Educational Technology Services Director of Client Services if the Purchase Requisition includes computer hardware.

6. Retain a copy of the signed Purchase Requisition for your files before sending the original to District Purchasing Services. You must refer to the Purchase Requisition number when making inquiries about the status of your Purchase Requisition.