

PURCHASING STANDARD OPERATING PROCEDURES (EXTERNAL)		NO: PX-101
Title: Purchase Requisition Preparation Procedures - Manual		Approved:
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1. **PURPOSE**

To provide detailed instructions for completing a manual purchase requisition (OR).

2. **SCOPE**

Schools and Departments that are unable to access Munis or need to submit requisitions after the "Current Year" requisition entry has been disabled are authorized to submit an OR to the Purchasing Department on paper forms.

3. **GENERAL**

The purpose of the purchase requisition is to communicate with purchasing what you want. It is the source document for the preparation of a purchase order that will be sent to a vendor. It must be legible and clearly identify your requirements.

The purchase requisition form should be completed and saved or scanned to a PDF document and emailed to the Purchasing Department (purchasing@k12northstar.org). Retain a copy for your Requisitions Pending file.

Once keyed by the Purchasing Department, the requisition will enter workflow for approval by the designated approvers.

4. **INSTRUCTIONS**

The following letters are keyed to the attached sample purchase requisition form (enclosure 1):

- a. School or department initiating the requisition.
- b. Point where Shipping & Receiving should deliver the goods. Normally the school that initiated the request. Central Office department ordering for delivery to a school should specify the school here.
- c. Date the goods are required. Be reasonable. The average order-ship-time is 60 days to Alaska from the lower '48. Leave blank if you don't care. Don't use

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ASAP.

- d. Vendor name and address. Please supply purchasing with the company name, address, phone, and fax number. If possible, a tax ID number is helpful.
- e. FOB (Free on Board) terms. This will be either "O" for ORIGIN or "D" for DESTINATION. Read the catalog terms carefully. ORIGIN means that you will be charged for the cost of shipping. DESTINATION means that the vendor pays the freight. When calling for quotations, try to negotiate a DESTINATION price.
- f. The name of the individual that gave you the quotation (for telephone quotes).
- g. Date requisition prepared.
- h. Item No. Use the School District item number if known. Refer to Qualified Products Lists published by purchasing. If not known, use a sequence number.
- i. Description of item desired. Make it complete yet concise. Include sufficient descriptive adjectives so that purchasing and the vendor can determine what you want. Include size, colors and always, the brand and manufacturer's model number. Any additional remarks you have should be placed in this block. **Place the source of the unit price, i.e. "Pricing per Sears 1992 Winter-Fall Catalog" or "Pricing per quotation by John Doe, 8/26/92" in this block or the Special Handling Instructions block. If any item cost require that an RFQ or IFB be issued and the item is not on the item catalog, provide adequate specifications to allow preparation of a solicitation by the purchasing department.**
- j. Vendor Catalog stock or part number. Most large mail order companies identify their stock with their own catalog number. Put it here.
- k. Unit that the item is sold in. Use the unit that is specified in the catalog. Common units:

EA	Each
PR	Pair
DZ	Dozen
GR	Gross
LB	Pound

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C Hundred
M Thousand

For indefinite units such as TU (tube), CL (coil), CS (case) describe in the description field

- l. Quantity (in the specified units) that you want.
- m. Unit Price. Ensure that you have sufficient funds and are prepared to spend them.
- n. Extended Price. QTY REQ X UNIT PRICE.
- o. Quantity Received. Record the quantity received when the items are delivered. This will allow you to quickly see which items have not been received when following-up open requisitions.
- p. Account number to be charged.
- q. Sum of the extended price for this page only.
- r. Sum of the totals of all pages of the requisition.
- s. Page number of this page.
- t. Special Handling Instructions. Put any exceptions to normal processing in this block. Examples include "Prepay, forward the check to the vendor with the purchase order"; "Return PO to school for pick-up"; or "Prepay, return check and PO to school" etc.
- u. Teacher/Requester. Enter the name of the individual within the school/department that initiated the requirement. This will facilitate your custodian's ability to deliver the items to the appropriate individual after they are delivered by Shipping and Receiving.
- v. Budget approval (leave blank).

5. **BACK-UP**

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See PX-100, paragraph 7 for a description of “back-up” documents required to be submitted with your OR.