

PURCHASING STANDARD OPERATING PROCEDURES (EXTERNAL)		NO: PX-101
Title: Purchase Requisition Preparation Procedures - Manual		Approved:
Date: Oct 20, 2000	Supersedes: Mar 27, 1997	Page 1

1. **PURPOSE**

To provide detailed instructions for completing a manual (hard copy 3 part carbon/paper) purchase requisition (OR).

2. **SCOPE**

Schools and Departments that are not on-line with the Business Office Financial Management System (JD Edwards) 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 clearly identify your requirements and be signed by the building principal or Central Office department head/coordinator that is responsible for the appropriate account specified on the requisition.

The purchase requisition is a three (3) part form. Submit copies 1 and 2 to the purchasing department. Retain copy number 3 for your Requisitions Pending file.

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

PURCHASING STANDARD OPERATING PROCEDURES (EXTERNAL)		NO: PX-101
Title: Purchase Requisition Preparation Procedures - Manual		Approved:
Date: Oct 20, 2000	Supersedes: Mar 27, 1997	Page 2

- 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. Signature of Principal/Department Head/Coordinator.
 - h. Date requisition prepared.
 - i. 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.
 - j. 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.**
 - k. Vendor Catalog stock or part number. Most large mail order companies identify their stock with their own catalog number. Put it here.
 - l. Unit that the item is sold in. Use the unit that is specified in the catalog. Common units:

EA	Each
PR	Pair

PURCHASING STANDARD OPERATING PROCEDURES (EXTERNAL)		NO: PX-101
Title: Purchase Requisition Preparation Procedures - Manual		Approved:
Date: Oct 20, 2000	Supersedes: Mar 27, 1997	Page 3

DZ Dozen
GR Gross
LB Pound
HD Hundred
MX Thousand

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

- m. Quantity (in the specified units) that you want.
- n. Unit Price. Ensure that you have sufficient funds and are prepared to spend them.
- o. Extended Price. QTY REQ X UNIT PRICE.
- p. 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.
- q. Account number to be charged.
- r. Sum of the extended price for this page only.
- s. Sum of the totals of all pages of the requisition.
- t. Page number of this page.
- u. 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.
- v. 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.

PURCHASING STANDARD OPERATING PROCEDURES (EXTERNAL)		NO: PX-101
Title: Purchase Requisition Preparation Procedures - Manual		Approved:
Date: Oct 20, 2000	Supersedes: Mar 27, 1997	Page 4

w. Budget approval (leave blank).

5. **BACK-UP**

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

6. **DISTRIBUTION**

The distribution of the requisition form is indicated in the block in the lower left corner of the form. Retain the pink copy for your suspense file. After purchasing enters the order, the requisition and purchase order numbers will be recorded. The PO line number may be different than the sequence of the items on your requisition form if your order is consolidated with another order. You need this information for receiving. The yellow copy will be returned to you after purchasing places the order. Also be alert to the vendor block. Purchasing may place your order with a different vendor than you recommend depending on price, availability and/or responsibility.

Please make the requisition legible. If we cannot read the document, it will be returned without action.

Fairbanks North Star Borough School District Purchase Requisition

Attention Vendor: This is not an order.

School/Dept Name: Dept/Loc Code: Ship to: S&R Self Delivery to: Email: Reference: General Notes:	Today's Date: Needed by Date: Other: Vendor Number: Vendor Name/Address: Vendor Phone: Vendor Contact:
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Line #	Vendor Item #	Description (Brand, model, color, size, etc.)	UOM	Qty	Unit Price	Ext. Price
Acct No:						
Acct No:						
Acct No:						
Acct No:						
Acct No:						
Acct No:						

Special Handling:

