



## **Instructions for completing Purchase Requisition forms**

The new form can be completed on your computer and printed for signing by the person responsible for the requesting department and then forwarded to the Purchasing Department.

REMINDER: The purchase requisition is the internal document necessary to begin the procurement process. A requisition is necessary for all purchased products/services except for purchases done with a Trinity College corporate Credit Card. Note that a requisition identifies a need. A purchase order is the *legal document* which fulfills that need. As such, this requisition form is NOT to be sent to any vendor for any reason.

- Vendor Name Section: Please complete as much as possible. If certain information is not known or available, Purchasing can fill in the blanks once we get the requisition. Do not combine commodities that are to be purchased from different vendors. Separate purchase requisitions should be prepared for each individual vendor. Similar items from the same source can and should be grouped together on the same requisition.
- Deliver to: Enter a complete internal address for delivery along with attention line.
- Date of Requisition: Enter the date of the request .
- Date Required: Enter the date that the goods or services are to be delivered to the requester. Please remember to allow for standard processing time within the Purchasing Department and for order filling and shipping time from the vendor. If there is a critical need, please note so clearly on the form in the comment field.
- Accounting Distribution: Use these boxes (account number, Fund code, program code, department, project) to identify where the purchase should be charged to.
- Requested by and date: Enter the name of the person completing the form
- Telephone #: Enter the phone extension number for the person completing the form.
- Approved by (Department Authority) and Date: The person who has signing authority for the funds noted on the requisition will sign and date the form here once it is completed and printed. Purchase requisitions must be approved by the appropriate department signing authority before Purchasing can act on the request.
- Quantity: Amount of each item requested.
- Part Number: If possible, include a manufacturer part number.
- Unit of Measure: Describe how the items are packaged and/or will be sent (i.e. each, box, carton, case)
- Description: Provide complete information on the product or service being requested. If possible, include a manufacturer name. If a vendor quote, product brochure, catalog page, or anything else that describes the item is available, please note "see attached" and staple a copy of references information to the requisition.
- Unit Price: Cost per each, box, carton, etc.
- Extended Price: Unit price multiplied by the quantity requested.
- Comments: Enter here any special notes regarding issues like special delivery instructions, quote numbers, etc.

- Requisition total dollar value: Include all extended amounts and any additional charges for shipping (if you know what they are)

Once the form is completed, please forward it along with any attachments to the Purchasing Department. We will verify that the form is complete and that the information regarding the requested purchase is current and accurate, and make adjustments and fill in the blanks as necessary. If we identify any significant increase in total cost due to things like outdated vendor quotes, omitted shipping charges, mathematical errors in calculating the extension costs or requisition totals, we will update the requisition so that it matches the purchase order.

As always, if there are any questions, please call Purchasing at x4261