

Departmental Requisition

OVERVIEW

Departments use *Departmental Requisitions* to request that Purchasing Services initiate purchases of goods and services.

Departmental Requisitions are used to:

- Initiate acquisition of goods and services by purchase order or contract.
- Initiate acquisition of nonemployee labor for services subject to prevailing wages (e.g., carpentry, electrical, plumbing), unless Purchasing Services provides authorization for a policy exception (*BPPM 70.07*).
- Initiate establishment of blanket orders for goods and services.
- Initiate establishment of a University contract for goods or services.
- Initiate renewal of blanket orders or contracts.
- Request payment of an invoice for goods or services ordered without authorization by exception to policy (*BPPM 70.20*).

Purchasing Services conducts most purchasing transactions over \$10,000, except transactions for commodities purchased through Facilities Services, Operations. See [Purchases Through Facilities Services, Operations](#).

Departments are encouraged to conduct purchasing transactions up to \$10,000 through direct buy purchasing methods, except transactions for commodities that must be purchased through Facilities Services, Operations and for capitalized equipment. See [Purchases Through Facilities Services, Operations](#) regarding commodities and *BPPM 20.50* regarding capitalized equipment.

GENERAL INSTRUCTIONS

Form Versions

The Department Requisition form is available in PDF and FileMaker format on the PR&F website at:

policies.wsu.edu/prf/index/forms/

The Departmental Requisition must be typed or completed electronically.

Alternate Departmental Requisition Records

Alternate departmental requisition records may be substituted for Departmental Requisitions if Purchasing Services approves the alternate requisition record prior to department use.

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Alternate Department
Requisition Records (cont.)

The expenditure authority must sign and date the alternate departmental requisition record to certify the accuracy.

Purchasing Services maintains a record of all units requesting and using alternate departmental requisition records. Purchasing Services also maintains a copy of the alternate departmental requisition record used by each requesting unit.

**Ordering Department
Responsibilities**

The ordering department determines quantities, minimum technical requirements, and delivery requirements of goods and services.

The department is required to supply justification when a sole source is recommended. (See *BPPM 70.01* for a discussion of sole source vendor.)

The ordering department is responsible for ensuring that adequate funds are available to purchase the ordered items.

Trade-Ins

See *BPPM 70.12* for special procedures if existing equipment is offered for trade-in value.

Online Tracking

The ordering department may look up the purchase order number and order status by accessing PAPR. PAPR may be accessed by any employee with an AIS password (*BPPM 85.37*).

ROUTING AND FILING

Send the original to Purchasing Services, French Administration 220, campus mail code 1020.

The ordering department retains a copy of the signed requisition as a control copy.

**COMPLETION
INSTRUCTIONS**

The numbered instructions correspond to the numbers on the sample [Figure 1](#).

1 Campus Mail Code

Indicate the ordering department's campus mail code.

2 Department

Indicate the name of the department (Chemistry, Education, Agricultural Economics, etc.).

3 Date

Fill in the date that the requisition is completed.

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<p>Washington State University DEPARTMENTAL REQUISITION</p> <p>Send original to Purchasing Office; Mail Code 1020.</p>										<p>DO NOT WRITE IN THIS BLOCK</p>					
DEPARTMENT 2			MAIL CODE 1		DEPT. FAX NO.			VENDOR NO.		PURCHASE ORDER NO.					
DATE 3		DEPT. NUMBER 4		REQUISITION NUMBER 5						DELIVERY					
<p>Enter an Alternative Delivery Location for delivery to a site other than the default location for the Department Number shown above.</p>										AUTHORITY		PLACEMENT		F.O.B.	
<p>ALTERNATIVE DELIVERY LOCATION 6</p>										PRICE SOURCE		QUOTE DATE		FREIGHT	
DEPARTMENTAL CONTACT 7			TELEPHONE			DELIVERY NEEDED BY 18				WSU BID NO.		PAYMENT TERMS			
TECHNICAL CONTACT 8			TELEPHONE			ENCUMBRANCE REQUIRED BY 19				VENDOR QUOTE NUMBER		SOLE SOURCE			
Fund		Subf	Prog	Budget 9		Project	Object	Sub	Dist (% or \$)			SPS APPROVAL		BUYER APPROVAL	
										<p>EXPENDITURE AUTHORIZATION</p>					
										NAME AND TITLE OF EXPENDITURE AUTHORITY (TYPE OR PRINT) 10					
										Signature of Expenditure Authority 11					
										<p>X</p>					
ITEM NO	ITEM -- List Catalog Number and Complete Description						QUANT	UNIT	UNIT PRICE		AMOUNT				
	Double Space Between Items														
12	13						14	15	16		17				
<p>VENDOR NAMES, POSTAL AND E-MAIL ADDRESSES, FAX AND TELEPHONE NUMBERS (Include Vendor Number, if known.)</p>										DEPARTMENT PRICE SOURCE 20		PREVIOUS PO NO.			
1.	21														
2.	<p>Example: catalog, previous order, telephone, written, estimate. (If previous order or catalog, add number and date. If written, attach copy of quotation.)</p>														

Figure 1

Departmental Requisition

4 Dept. Number (Organization No.)

Enter the department's organization number in **Dept. Number**. Purchasing Services, Accounts Payable, and Central Receiving and Delivery use this number to help track the purchase.

Central Receiving and Delivery delivers the order to the address associated with this organization number.

To find the organization number and associated address for any WSU unit, refer to the WSU Organizational Unit Inquiry (WSUORG), an online Administrative Information System application (*BPPM 85.37*). If online access is not available, telephone Purchasing Services at 509-335-3541 for organization numbers.

5 Requisition No.

Departments are to establish a numbering system, assigning a separate number to each requisition. The number of characters composing a requisition number may not exceed eight. A number should not include symbols or punctuation. The department and Purchasing Services use this number to track the purchase.

6 Building, Room

If the delivery location is different than the default location for the indicated organization number, indicate where the order is to be delivered, including building and room. Otherwise, leave these fields blank. Include any special delivery instructions in the body of the requisition.

7 Departmental Contact

Indicate the name and telephone number of the administrative or clerical employee responsible for tracking the purchase if the name is different than the default contact name for the organization number as recorded in WSUORG.

8 Technical Contact

Indicate the name and telephone number of the individual who will be using the purchased item.

9 Account Coding

Complete the account coding boxes. When splitting an order between two or more budgets, indicate the amounts for each line of coding under **Distribution**. Percentage designations are preferred, because the exact cost is not always known. However, amounts may be the appropriate designation when the balance of a grant or contract is involved.

10 Name of Expenditure Authority

Type the name of the individual signing for the expenditure. This individual must have been delegated expenditure authority for the indicated account(s). See *BPPM 70.02* for an explanation.

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- 11 Signature of Expenditure Authority** The above-named individual signs the requisition, authorizing the expenditure.
- 12 Item No** This is a consecutive counting of the items ordered, i.e., 1, 2, 3, 4, etc. It is *not* a catalog number.
- 13 Item** This is a description of the ordered item. Double space between items. Indicate the catalog number first, the name of the item, then additional description as needed (color, size, etc.). If there are more than ten items, please type "per attached list" in this section and send a neatly typed list containing all the line items on white bond suitable for photocopying. This procedure is recommended for advertisements and for items with long specifications.
- 14 Quant** This is the total number of described items.
- 15 Unit** This is a single-quantity description, for example, "each," "cases," "grams," "pkg," "doz," "gal," etc.
- 16 Unit Price** This is the price for one unit.
- 17 Amount** This is the extended total, i.e., quantity times unit price.
- 18 Delivery Needed By** Provide a date if delivery by a specific date is critical.
- 19 Encumbrance Required By** This is especially important for orders placed in the last few months of a research grant or contract. It is inadvisable to encumber up to 90 days before the expiration of a grant or contract. Encumbrances at the closing periods of a grant or contract must be justified by the requisitioning department or principle investigator. See *BPPM 40.03* for a discussion of expenditure deadlines for sponsored projects.
- 20 Department Price Source** Indicate where price information was obtained, e.g., catalog, quotation, telephone conversation, previous order, advertisement, or estimate. Attach a copy of a quotation, if available.
- 21 Vendor Names, Addresses** Indicate the name, address, telephone number, and fax number of the company to which the order is to be sent. If the order is to be bid, list several potential sources if possible. If a single source is recommended, provide justification (*BPPM 70.01*).

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PRIOR APPROVAL Certain types of purchases require additional approval before they may be ordered. Reasons for this approval include safety of personnel, matching major pieces of equipment, or state of Washington requirements.

WSU Units/Administrators The department may route *Departmental Requisitions* through indicated approval channels before sending them to Purchasing Services. This may expedite order processing.

Commodity

Source of Approval

Air Conditioners, Heaters Facilities Services, Operations—Director, Maintenance and Utilities Services; mail code 1150

Biological Safety Cabinets (Hoods) Environmental Health and Safety—University Industrial Hygienist; mail code 1172; *and* Facilities Services, Operations—Director, Maintenance and Utilities Services; mail code 1150.

Equipment Requiring Support Utilities or Auxiliary Equipment (e.g., Autoclaves, Sterilizers) Facilities Services, Operations—Director, Maintenance and Utilities Services; mail code 1150

Personal Services Contracts Dean, director, or principal administrative officer (see also *BPPM 70.50*).

Printing and Copying Services See *BPPM 80.05*.

Radioactive Materials Nuclear Radiation Center—Radiation Safety Supervisor; mail code 1302 (see *SPPM 9.50*).

Research Databases Library Administrative Office—Assistant Library Director, Administration

Carpeting, Floor Coverings, Window Coverings, Furniture Requiring Connections to Building or Building Utilities Purchased through Facilities Services, Operations (without *Departmental Requisition*). See [Purchases Through Facilities Services, Operations](#). (NOTE: Housing and Dining Services submits requests for such commodities with *Departmental Requisitions* to Purchasing Services. Housing and Dining Services purchases do not require approval by Facilities Services, Operations.)

PURCHASING SERVICES Purchasing Services verifies that all proposed purchases are appropriate and in accordance with WSU and state of Washington policies. See *BPPM 70.03* for general guidelines regarding allowability.

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QUESTIONS

To look up the status of a *Departmental Requisition*, access PAPR. PAPR may be accessed by any employee with an AIS password (*BPPM 85.37*).

- Log in to PAPR.
- Select **DEPTREQN** to go to the Departmental Requisition subsystem.
- Select **QDRID** to query by requisition number.
- To view the status of a purchase order, select **SRCPORID**.
- To view the status of a blanket order, select **SRCBARID**.

Contract Status

To query the current status of a contract, telephone Purchasing Services at 509-335-3541.

DIRECT BUY PURCHASES

Departments have direct buy authority for allowable purchases up to \$10,000.

Departments are encouraged to purchase all allowable goods and services with University purchasing cards (*BPPM 70.08*).

Departments that do not have University purchasing cards are encouraged to purchase all allowable goods and services with Department Orders (*BPPM 70.07*).

NOTE: Issuance of multiple department orders or purchasing card transactions to circumvent the direct buy limit is prohibited.

PURCHASES THROUGH FACILITIES SERVICES, OPERATIONS

Departments are to contact Facilities Services, Operations to initiate purchases for the following commodities:

- Carpeting
- Floor coverings
- Window coverings
- Furniture requiring connections to the building or building utilities

The department does not submit a *Departmental Requisition* for Facilities Services, Operations purchasing transactions. See *BPPM 80.45* for procedures to request Facilities Services, Operations purchasing services.

Exception

Facilities Services, Operations does not initiate purchases of carpeting, floor coverings, window coverings, or furniture requiring connections to the building or building utilities for

PURCHASING
70.10.8
Revised 10-17
Purchasing Services
509-335-3541

BUSINESS POLICIES AND PROCEDURES MANUAL

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Exception (cont.)

Housing and Dining Services. Housing and Dining Services submits Departmental Requisitions to Purchasing Services to initiate such purchases.