

The Santa Monica College Purchase Requisition Form Instructions

Electronic Purchase Requisition Form Procedures

The purchase requisition begins the purchase order process. It defines the need for the acquisition of goods and services, while also authorizing the encumbrance of funds required for the purchase. The purchase requisition is an internal document and does not represent any contractual arrangement with a supplier.

The following instructions are provided to assist you with preparing the electronic Purchase Requisition Form (Adobe Acrobat is required).

Note: Use the <TAB> key to move from field to field.

Requestor Information/Approval Section

1. **Fiscal Year:** Type in the fiscal year.
2. **Requisition No.:** This field is for your reference. (Not Required)
3. **Department:** Type in or select your Department Name.
4. **Delivery Date:** Enter the day you need the items by (ASAP is not an acceptable entry).
5. **Requestor:** Type in the name of the requestor.
6. **Approver:** Type in the name of the Department Head/Administrator
7. **Vice President:** Type in the name of the Vice President
8. **Fiscal Svcs:** This field will be completed by the Fiscal Services Department.
9. **Deliver to Dept.:** Enter the department name where the items should be delivered.
10. **Name/Ext.:** Enter the name and extension of the person to be contacted upon delivery.
11. **Bldg. Rm.:** Enter the building and room number where items shall be delivered.
12. **Standard Comments/Notes:** Enter any notes or comments pertaining to the line items or services. (e.g. If requesting an increase to an existing order, please enter Purchase Order number)

Account String Information Section (Please contact Fiscal Services to obtain additional information pertaining to your program's budget or account information)

PSFS (PeopleSoft) Account String Example

Fund	Res.Proj.Year	Goal	Location	Object	Activity
01.0	00000.0	00000	00004	4550	6771000

13. **FUND:** Enter the fund number to be charged. (3 digits) If charging more than one account, please enter the amount for each account string on the extra lines provided.
14. **RES.PRJY:** Enter the resource project year. (6 digits)
15. **GOAL:** Enter the catalog year. (5 digits)
16. **FUNC/LOC:** Enter your department/location number. Add zeros in from of location. (5 digits)
17. **OBJECT:** Enter the object code. (4 digits)

18. **SCH/LOC/ACTIVITY:** Enter your program code. (7 digits)
19. **AMOUNT:** Enter the amount to be encumbered.

Line Item Information

20. **Quantity:** Enter the quantity needed for each item.
21. **UOM:** Select the unit of measure. Use the abbreviations listed.
22. **Unit Price:** Enter the unit price for the item being purchased if known.
23. **Ext Price:** The extended price will automatically calculate by multiplying the quantity times the unit price.
24. **Category:** Please select a category from the drop-down menu.
25. **Due Date:** Please enter the date you need the items delivered by. Keep in mind that upon delivery, the Warehouse/Receiving department will coordinate any additional procedures required before prompt delivery to your department. (required)
26. **Item Description:** Type the description, model number, manufacturer, size, weight, color and/or any other pertinent information related to this item. This field is free form and does not have a limitation of character space, but will decrease the font to auto adjust. If you require more space, please attach the description. Please do not fill the space to an unreadable font.
27. **Suggested Supplier:** Enter the name, address and contact information of the suggested supplier (if known).
28. **Extension Price:** The sum of the extended price of each line will be calculated automatically.
29. **Tax:** Enter the amount of tax (if known) for your reference.
30. **Shipping:** Enter the amount of shipping (if known) for your reference.
31. **Total:** The sum of the Extension price, tax and shipping amounts will be calculated automatically.

Please attach any pertinent information (i.e. quotation, brochure, etc.) and forward to Fiscal Services in the Business & Administration Building.

If the requisitioning items are more than \$86,000, competitive bids are required and shall be facilitated through the Purchasing Department. Please refer to the Transaction Level & Approval Grids available on our website: www.smc.edu/purchasing for more information or contact the Purchasing Department at Extension 4304.

Santa Monica Community College District REQUISITION

1. Fiscal Year:

2. Requisition No:

3. Department:

4. Location No.:

5. Requestor:
Printed Name Signature Ext. Date

6. Approver:
Printed Name Signature Ext. Date

7. VP:
Printed Name Signature Ext. Date

8. Fiscal Svcs:
Printed Name Signature Ext. Date

Fiscal Services Use Only:

Purchasing Use only:

9. Deliver To Dept.:

10. Name/Ext.:

11. Bldg. Rm.:

STANDARD COMMENTS/NOTES
12.

FUND	RES. PRJY	GOAL	FUNC/LOC	OBJECT	SCH/LOC/ACTIVITY	AMOUNT
13.	14.	15.	16.	17.	18.	19.

LINE NO.	QUANTITY	UOM	UNIT PRICE	EXT PRICE	CATEGORY	DUE DATE
1	20.	21. ▾	22.	23. \$ 0.00	24. ▾	25.
Item Description	26.					

LINE NO.	QUANTITY	UOM	UNIT PRICE	EXT PRICE	CATEGORY	DUE DATE
2		▾		\$ 0.00	▾	
Item Description						

LINE NO.	QUANTITY	UOM	UNIT PRICE	EXT PRICE	CATEGORY	DUE DATE
3		▾		\$ 0.00	▾	
Item Description						

SUGGESTED SUPPLIER:	
Name: 27.	28. Extension Price: \$ 0.00
Address:	29. *Tax:
City, State, Zip:	30. *Shipping:
Telephone:	31. Total:
Contact:	Email:

*Note: For your internal reference only. In PSFS tax and freight are encumbered only on the Purchase Order.