General Purchase Requisition Handbook
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How to Generate a Purchase Order

To generate a purchase order (PO), you must first submit a purchase requisition. Attached is a sample req so that you can see what the requisition will look like when you send it back to us.

Purchase Requisition Link: https://inside.southernct.edu/procurement-services/requisition-form

What Should I Send to Procurement?

1. Purchase Requisition
   a. FOAP String (Index – Fund – Org – Account – Program)
   b. Signatures
   c. FEIN #

2. Invoice or Quote/Estimate
   a. Total amount must align with purchase requisition
   b. Please make sure quotes are not outdated

3. W9 (If the vendor is outdated or new)
   a. Dated 2018 to current day (View top left-hand corner of W9 form)
   b. Request W9 from vendor

4. Any supporting documents or conversations
   a. Contracts, Agreements, Etc.
**Purchase Requisition Requirements Based on Total Amount of the Requisition**

For requisitions that are **under $5,000.00**
- Your signature alone is fine in the 'Approved By' section.

For requisitions that are **$5,000.00 and above**
- Your signature, as well as an additional signature from the VP, AVP, Provost or Dean (whoever you report to) is required.

For requisitions that are **over $25,000.00**
- A state/SCSU contract #
- Sole Source Solicitation
- 2 additional quotes

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**Description Box**

1. Type in the exact information from the invoice or quote, and/or;
2. Be specific about what the purchase is intended for

This helps Procurement Services determine how to proceed. If the description is long winded, it may be better to specify the purchase intention.

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**Purchase Requisition Processing Times**

Processing times are dependent on the time of year. Generally it should take Procurement anywhere from four (4) days to one (1) week to process requests.

The beginning of the fiscal year (07/01) prolongs processing times due to an influx of requests

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**What Does Procurement Services Do with Requisitions?**

Procurement Services turns the requisition into a Purchase Order. Each purchase goes through three (3) phases of approval:

1. Requisition Budget Approval
2. Purchase Order Budget Approval
3. Purchase Order Final Approval
**Purchase Order Disbursement**

Requisition with Invoice:

1. Procurement Services sends the PO to Accounts Payable
2. Check Run Days = Wednesdays

Requisition with Quote/Estimate:

1. Procurement Services sends the PO to the Vendor
2. The Vendor sends an invoice to the buyer
3. The buyer sends an invoice to Accounts Payable

**Payment on Purchase Order**

Procurement Services DOES NOT process payments. After PO distribution, Procurement Services is solely responsible for record keeping and change orders/cancellation requests.

**How to Create a Change Order**

1. Create a new requisition
2. The total amount should reflect the amount that is being changed.

The description should read:

“Change order on [Insert PO #] to increase the total amount by $_____ for [Reason Why Change is Required]. New PO Total should be $_______ [Add previous amount to the change amount]”

**Ship To Addresses**

The 'Ship To' address is automatically generated by the Org # provided. Unless there is a switch in financial managers (which has to be indicated by the department) the 'Ship To' address remains the same. If the ship to address is changed, it will affect all future POs tied to the provided Org #.