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Policy 3-190: Requisition Preparation and Processing

I. Purpose & Scope

To outline requirements and instructions for preparing and processing requisitions.

II. Definitions ¹

Requisition: A form used to initiate the procurement of supplies, and services or construction utilizing approved university purchase orders. Requisitions are not purchase orders and shall not be used or represented as such.

III. Policy

A. Use of Requisitions

1. Except as provided in paragraph 2 below, a requisition must be submitted to initiate the procurement of supplies, services or construction by Procurement & Supply Management (Procurement).

Note: University operating units that are authorized to engage in direct procurement without going through Procurement are listed in [Policy 3-100, Section IV. B. 1](#).

2. Items or services not requiring a requisition include:
 - a. Purchases under \$5,000 See [Policy 3-191](#).
 - b. Payroll or attendance reports. See [Policy 5-402](#).
 - c. Travel: Hotel accommodations for university guests should generally be made through preparation of a purchase order, requisition or request for travel. (See [Policy 3-031](#).)
 - d. Telegrams, telephone and TWX services. All questions concerning these services should be directed to the manager of Telecommunications.
 - e. Maintenance of university buildings or grounds. For maintenance of departmental equipment, see [Policy 3-210](#).
 - f. Purchases from the Bookstore, Stores and Receiving, Food Service, Printing Service or other campus agencies, using campus orders. See [Policy 3-193](#).
3. Orders which are of an urgent nature may be placed by telephone call to Procurement. Telephone requests must be followed up by a written requisition, which must be marked "confirmation of telephone order" to avoid duplicate shipment. (Also see [Policy 3-191](#).)



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4. Departments may request that Procurement obtain price quotations only, by clearly marking "Request for Quotation Only" on the face of the requisition. A request for quotation will not obligate a department nor encumber funds until the department authorizes Procurement to acquire the requested item.
5. Blanket orders may be requested when services or supplies are required with some degree of regularity, but the exact quantities are not easily determined in advance. A blanket order will generally be valid only for a specified time period and/or for a specific dollar value. Most general fund blanket orders expire on June 30 of each year. Restricted fund blanket orders are assigned individual expiration dates, usually 30 days before the contract expires. The blanket order number must be given to the vendor each time an order is placed. Blanket orders may not be used to purchase capital equipment items (items valued in excess of \$5,000) or single billings in excess of \$5,000 unless authorized on the order by Procurement.

B. Requisitions for Purchases Charged to Research Contracts

1. Requisitions submitted during the final weeks of a contract or grant period cannot be processed unless they have the approval of Grants & Contracts Accounting, after consultation with the Office of Sponsored Projects.
2. A requisition for the purchase of equipment under a research contract or grant must be received no later than thirty (30) days prior to the end of the contract or grant period.
3. No equipment may be ordered on a research contract or grant after the contract or grant has terminated.
4. Supplies for use on a research contract or grant must be requisitioned a sufficient time prior to the termination of the contract or grant so that the supplies (a) will be received prior to the termination date, and (b) will in fact be used or expended for the benefit of the project.

C. Equipment Screening

1. Equipment purchases from funds controlled by the university are not authorized if the university already possesses identical, substantially similar or functionally equivalent equipment that is reasonably available for use by the requisitioning unit.
2. Before submitting a requisition for purchase of equipment estimated to cost more than \$5,000, the requisitioning department is expected to conduct a conscientious search to determine the existence on the campus of equivalent equipment and its availability for departmental use.
3. Signatures affixed to equipment requisitions of \$5,000 or more shall be deemed to certify that such a departmental search has

been made, but that the department was unable to identify suitable equipment that was reasonably available for department use in lieu of the equipment being requisitioned.

4. All requisitions for the purchase of capital equipment with an anticipated price of \$10,000 or more must be systematically screened campus wide for availability of equivalent equipment, with the assistance of the Property Accounting Office, before the requisition can be processed. (See Policy 3-045.)

D. Procedure

1. Form and Contents of Requisition

- a. Each requisition must include as a minimum the following information:
 - i. An accurate description and specification for every article listed, including catalog numbers, size, color, etc., but not so restrictive as to unduly limit competitive bidding.
 - ii. Authorized accounting distribution code.
 - iii. Delivery instructions, stating specifically (1) when delivery is required, and (2) where delivery should be made, e.g., department, name of responsible individual, building and room number, and location/ship to code.
 - iv. Estimated cost of each item.
 - v. Possible sources of supply--list suggested sources and provide copies of any price information or correspondence referring to specialty items.
 - vi. Signature of the account executive, department head or authorized representative. Requisitions must be signed, not rubber stamped.
- b. Requisitions should be typed whenever possible.
- c. The following guidelines are prescribed for use of detail codes on requisitions:
 - i. Equipment accounting distribution codes should be used for items with unit costs in excess of \$1,000 and an estimated life expectancy exceeding one year.
 - ii. Supply accounting distribution codes should be used for purchases of supplies and services, including the replacement of items originally purchased in large quantities with unit values of less than \$1,000, and items that cannot be inventoried (glassware, surgical instruments, etc.).
 - iii. Travel accounting distribution codes should be used for car rentals and special transportation services properly chargeable to travel budgets. Normal requests for individual

travel arrangements should be processed as required by Policy 3-030.

- d. Separate requisitions should be prepared for each different account number used. However, when the cost of a single item is to be allocated to more than one account, only one requisition form should be used and the dollar amount allocated to each account detailed thereon.
- e. Each requisition should, so far as possible, be limited to similar or related items that are known, or can reasonably be expected, to be available from the same vendor.
- f. All equipment, supplies or services that are intended to be acquired at or about the same time as component parts of a single transaction should be included in the same requisition or series of related requisitions submitted simultaneously. It is improper under the law to divide or split procurement transactions into small units that are artificially devised to avoid the bidding requirements and other Procedures applicable to larger unit transactions. See 1953 Utah Code Annotated 63-56-22.

2. Processing of Requisition

- a. Upon receipt of a properly prepared requisition, Procurement will initiate proceedings leading to purchase of the requisitioned item in accordance with statutory requirements and university policy. (See Policy 3-100)
- b. Procurement will seek to correct by informal means errors and omissions on requisitions in consultation with the requisitioning unit and, so far as possible, consistent with legal requirements.
- c. Requisitions sent to Procurement will result in the encumbrance of departmental funds only upon issuance of a purchase order.
- d. Departments will receive an information copy of each purchase order awarded bearing the order number assigned to the transaction. Requests for information related to any requisition should refer to the purchase order number assigned by Procurement.
- e. The department copy of the purchase order should be checked promptly by the requisitioning department to assure that the order is correct. Any errors or discrepancies noted should be reported promptly to Procurement.

IV. Rules, Procedures, Guidelines, Forms and other related resources

- A. Rules *[reserved]*
- B. Procedures *[reserved]*
- C. Guidelines *[reserved]*

D. Forms *[reserved]*

E. Other related resource materials *[reserved]*

V. References

Policy 3-100, University Procurement

Policy 3-191, Small Purchases and Expedited Procurement

Policy 3-193, Requesting Service from Campus Agencies

VI. Contacts

Acting as the Policy Owner, the Office of the Director of Procurement & Supply Management is responsible for answering questions and providing information regarding the application of this policy. Acting as the Policy Officer, the Office of the Vice President for Administrative Services is responsible for representing the University's interests in enforcing this policy and authorizing any allowable exceptions.

VII. History

Editorially changed to renumber, updating format and Contact information, August 14, 2012

Revision 8: Approved, Institutional Council and Editorially revised, March 5, 2002

For additional definitions, see Policy 3-100.

Outdated as of 10/8/13
See R3-100C