

	<b>PURCHASING DEPARTMENT</b>  <b>FREDONIA</b> <b>STATE UNIVERSITY OF NEW YORK</b>	GUIDELINE NO: 103
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		ORIGINAL: January 2003 LAST REVISED: January 2016 REVISION DATE: July 2018
<b>TITLE: Requisition Processing</b> Explanation of requisition details		

## I. Purpose

The purpose of this guideline is to define what details are required on a requisition for submittal.

## II. Procedure

DO NOT USE MORE THAN ONE REQUISITION PER VENDOR. If more room is needed, please attach a sheet of paper and note requisition number on top.

1. Full account number on the requisition is required.

For Example: 860760 does not have any sub-accounts and therefore should be written as 860760.00

860620 is sub-accounted and which sub-account will be used needs to be noted as 860620.01 or 860620.02, etc.

Call Accounting at extension 3467 if unsure of sub-account information.

If a Department Chair, Dean or Vice President has given approval to use their account number; their signature is required **before** sending the requisition to the Purchasing Department.

2. Use full first names such as John Doe, no J. Doe.

3. If you receive written quotes, please attach them to the requisition.

For Orders: over \$2500 you must have 3 or more written quotes attached (it is your responsibility to be able to show justification of vendor and reasonableness of price for orders under \$2500)

\$20,000 & up must be advertised in the Contract Reporter

\$50,000 & up must have a formal bid, please contact University Services at x3257

A separate line is needed for Shipping/Handling/Freight charges per [OSC Guide to Financial Operations Chapter XII, Section 5.E.1](#). Request the vendor to include an approximate amount for charges in the quote.

4. Under suggested vendor, type as much information as you can, such as: vendor name, address (including zip code), telephone number, fax number (this is required), and Vendor ID number.

Any attachments should be filled out completely. (For example, order forms that go with requisitions, memberships, etc.)

Call the Purchasing Department at extension 3438 if additional quotes from vendors are needed.



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For “dotcom” vendors, full addresses are required which include city, state, and zip code. Also, please include telephone and fax numbers.

If you’re using a new vendor, a completed Substitute W-9 form for federal I.D. number verification is required. (This is NOT a tax exempt number, but a nine digit federal I.D. number). The form can be found on the Purchasing Website at

<http://www.fredonia.edu/admin/purchasing/purchasingforvendors/SubstituteW9Info.asp>

If it is a person, such as for a reimbursement, for Faculty/Staff we need his/her Employee ID number. Type the N number in the body of the requisition.

### **III. Documentation Required for Payment**

We prefer typed requisition. However, if it cannot be typed, please print LEGIBLY so we can read all information.

### **IV. Source**

[Guide to Financial Operations XII.5.E.1 Paying Sales Tax and Freight Amounts](#)