

## **2.1 College Requisition**

A purchase action in most cases initially requires the completion and processing of an on-line College Requisition for all sources of funds.

Standard – One-time delivery/one-time payment <http://web.uri.edu/purchasing/files/PeopleSoft-Purchasing-CR-Requisition-Standard-one-time-delivery-one-time-payment-1-20-2015.pdf>

Blanket – Multiple deliveries/multiple payments <http://web.uri.edu/purchasing/files/PeopleSoft-Purchasing-CR-Requisition-Blanket-1-20-2015.pdf>

Advice of Change – Changes to existing purchase orders

<http://www.uri.edu/purchasing/documents/PeopleSoftPurchasingAdviceofChangeCollegeRequisitionCRorSubcontractRequisitionSC2-15-12.pdf>

The following are procurement exceptions to the preparation and processing of a College Requisition:

- Drugs and Medical Supplies (see [Section 2.10](#))
- Payments via an Invoice Voucher (See the Controller's website [web.uri.edu/controller/accounting](http://web.uri.edu/controller/accounting))
- Small purchases processed on a Limited Value Purchase Order (see [Section 2.16](#))
- PCard purchases (See the Controller's website [http://web.uri.edu/controller/purchase\\_card.html](http://web.uri.edu/controller/purchase_card.html))
- Internal Vendor Requisition/Internal Vendor Purchase Order (see [Section 2.12](#))

Reasonable care should be exercised to include on each requisition only such items as can be furnished by the same type of supplier (e.g., do not combine chemicals with hardware). Explain in sufficient detail the items that are needed to preclude the possibility of an error on the part of the buyer and/or vendor.

In instances where specifications are complex and lengthy and/or when ordering ten or more items, a Bid Sheet must be prepared and attached to the on-line requisition in an excel format (see sample form and instructions for completing, [Section 3.3](#)). The requisition need only reference the Bid Sheet and in the description indicate "Materials per attached Bid Sheet". (Note: The bid sheet is available at [web.uri.edu/purchasing/forms.htm](http://web.uri.edu/purchasing/forms.htm).)

Each requisition should contain the suggested vendor, if available, however, if the suggested vendor is not in PeopleSoft or there are multiple suggested vendors, please include them as comment and/or attachment. If the material desired is only available from a single source, sole source or proprietary source, a justification form, must accompany the requisition. (see [Section 3.5](#)). As explained in the General Policies, final vendor selection is the responsibility of the Purchasing Department.

Specifications should not be unduly restrictive so as to eliminate competition, when such tight specifications are unneeded. In cases where brand names are used for the specification, solicitations will be represented as "or equal" citing the necessary requirements. Exceptions to this policy must be

communicated to the Purchasing Department. As an example, a certain brand of chemical or equipment may be required to uphold the "validity and integrity" of a research project ([see Section 2.5](#)).

Certain procurement requests require special review and approval before the requisition can be processed. Please refer to Section 2.4 of the Purchasing manual.

Each requisition should designate the date the goods or services are required. Every effort will be made to obtain delivery by the required date; however, proper planning and anticipating needs well in advance is the key to lower prices and timely delivery.

It is important that the exact delivery location, building and room number, be indicated on the requisition so that Central Receiving, the area where University materials are generally first shipped, will be able to deliver in a timely manner. Where special circumstances exist and delivery must be made directly to an individual department and require special handling, such as rigging or moving of furniture/equipment, a memo detailing such requirements must accompany the requisition.

See document flow charts for College Requisitions utilizing all funds in [Section 2.2](#).

Once a Purchase Order is issued, changes cannot be processed unless a detailed breakdown of the reason(s) for the change appears on the College Requisition, or on an attached memo. please refer to the College Requisition (CR) Advice of Change Manual <http://web.uri.edu/purchasing/files/PeopleSoft-Purchasing-Advice-of-Change-College-Requisition-CR-or-Subcontract-Requisition-SC-1-20-2015.pdf>

The Purchasing Department must have the reason(s) for the change when there's a request to change a purchase order, which may necessitate an Advice of Change document.

Only the Purchasing Department may authorize changes in description, quantity, dollar amounts, delivery, terms, and F.O.B. point.