

WSUTC

Purchase Request Guide

Business Services

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Purchase Request (PR) Guide

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Purchase Request (PR) Guide

When to use a Purchase Requests (PR)

- Initiate acquisition of goods and services by purchase order (PO) or contract.
- Initiate establishment of blanket orders for goods and services.
- Initiate establishment of a University contract for goods and services.
- Initiate renewal of blanket orders or contracts.
- Initiate a reimbursement (IRI), State of Washington Invoice Voucher, or PCARD purchase.

How to complete a PR

1. Check One: Identifies the action needed to complete the PR.

CHECK ONE: PURCHASE ORDER PCARD IRI INVOICE VOUCHER CONTRACT Chose an action

2. Need Date: *Plan accordingly*. PRs for most purchases should be initiated 30 to 60 days prior to the date the item is needed. Consider vendor lead times, shipping time, and approval/purchase processing time.

NEED DATE: 10/08/15
 VENDOR: Harney & Sons

NOTE: Please do not use ASAP as this is not an appropriate priority date. Do not use the “Date of Event” as most vendors need additional lead time.

3. Vendor: Provide the vendor's name and current mailing address; a *complete mailing address is required to generate a purchase order*. Include their email, phone, and website. Identify what the vendor accepts (i.e. PO or PCARD).

VENDOR:	Harney & Sons
ADDRESS:	15723 Route 22 Millerton NY 12546
EMAIL:	customerservice@harneyteas.com
PHONE:	888.427.6398
WEBSITE:	harney.com

NOTE: The purchasing card is the preferred method of payment for WSU unless the vendor does not accept card payments or the purchase requires a different purchasing method per policy.

4. Requestor: Provide your name, email, phone, and department or group name.

REQUESTOR:	Queen of Hearts
EMAIL:	q.hearts@wonderland.com
PHONE:	509.947.0910
DEPT/GROUP:	509.947.0910

NOTE: Procurement confirmation will be sent to the Vendor and Requestor unless otherwise noted on the PR.



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- 5. **Budget:** Include all pertinent budget numbers in the provided fields. Splitting the dollar amounts of equipment and supplies between budgets is possible. List budgets and associated dollar amounts in the appropriate section.

BUDGET:

PROG	BUDGET	PROJ	OB/SUB	DIST (% OR \$)
xxx	xxxx	xxxx	xxxx	50%
xxx	xxxx	xxxx	xxxx	26.03

Find Object/SubObjects (OB/SUB) at:

<http://purchasing.wsu.edu/Object-SubobjectCoding.html>

- 6. **Line Items:** Each line item should be listed on the PR. The purchase order must be itemized to match the vendor's quote/invoice. Use as many PRs as necessary to list your items, bring the totals to page 1.

Example: If you have 3 pages of PRs, bring the "Grand Total" of page 2 and 3 to page 1 "Additional Page Total (w/Tax)" field.

SALES TAX 0.0%	5.55
Additional Page Total (w/TAX)	1.00
GRAND TOTAL	\$ 15.53

NOTE: When applicable, place shipping cost on page one (shipping does NOT need to be broke down per item).

- 7. **Item Description:** Provide the details including the stock/part/model number, manufacturer, product name, packaging and general information. *Attach supporting information*, such as; a quote, maintenance agreement, copy of advertisement, order/membership/subscription form to your PR.
- 8. **Quantity (Quant):** Number of units needed.
- 9. **Unit:** Unit is the Standard Unit of Measure (i.e. box, carton, bottle, each, hours). *Please provide the correct units of measure (i.e. 10/box. The unit is box).*

Complete Purchase Requests may be

UNIT	UNIT PRICE
ea	17.00
ea	24.00

- 10. **Unit Price:** The individual price each unit of measure costs.
- 11. **Amount:** Quantity x Unit Price = Amount. PR totals automatically.

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12. **Shipping & Tax:** Where applicable, include the shipping in the appropriate field on the PR, underneath the subtotal.
Sales Tax defaults to Richland, WA city tax; this field can be edited as necessary.

		Where applicable	0.00
			0.00
Subtotal			41.00
Shipping			
SALES TAX	8.6%		3.53
Additional Page Total			1.00

NOTE: Tax has to be handled separately, so please do not include the tax in the cost of the merchandise.

13. **Check All That Apply:** There are prompts and/or justification identifiers needed for successful processing and documentation. Request to Serve Food must approved and submitted with the PR.

NOTE: 17A and GEARUP will have slightly different requirements.

14. **The 5 Ws:** Who, what, when, where, and why provides a quick snapshot as to the scope and purpose of the purchase.

WHO/WHAT: Mad Hatter Group, Tea Party Event
WHEN/WHERE: 11/01/15, CIG 120A

CHECK ALL THAT APPLY:

Food Purchase is for an "Open Event" 

Request to Serve Food & Roster

15. **Special Instructions:** This field is for the requestor to communicate to Purchasing any special requirements or instructions.

SPECIAL INSTRUCTIONS: POs will be sent to all emails listed on PR

Send a copy of the PO to treasurer March Hare march.hare@wonderland.com. List of attendees (roster) will be submitted after the event.

16. **Authorized Signatures:** Principal Investigator/Approving Official is the Departmental Manager/Director (or equivalent administrator) who has budget authority within the department. Other signatures may include 17A Reconciler and Expenditure Authority and Grant Reviewer.

APPROVED SIGNATORIES
I/we certify these expenditures are in compliance with all applicable WSU policies and regulations.

PRINCIPAL INVESTIGATOR/
APPROVING OFFICIAL: Department/Budget Manager 

Print/Type Name Signature

NOTE: As department budget personnel change, it is important to contact Purchasing and request a new signature card. Purchasing will accept any of the authorized signatures shown on the signature card.



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Additional Considerations:

1. PR Revisions: You can find the latest revision at <http://tricity.wsu.edu/business-services/Purchasing>.
2. Duplicate Orders: If you email a PR then mail the original, or submit two originals, you will get two purchase orders, thus duplicating your order.
3. Payment: If a purchase order is not issued before receipt of the merchandise, the vendor has no guarantee of payment.
4. Competitive Solicitations: Items totaling over \$10,000 are subject to the competitive quotation/bid process unless a state contract exists.

NOTE: Orders cannot be split to avoid the competitive process.

5. Sole Source: Sole Source purchases are those purchases over **\$10,000** which are clearly and legitimately limited to a single source of supply and involve special facilities, services, or market conditions per [RCW 39.26.140](#). Source limitations within geographical areas do not constitute a sole source situation. Complete a Sole Source Justification Form and submit it along with your completed PR.
6. Contracts: A PR and Contract Supplemental worksheet is required for all contract, amendment, and renewal requests.

Contracts obligating Washington State University may only be signed by individuals who have been delegated the authority to enter into and execute contracts by the President of the University ([RCW 28B.10.52](#)).

7. Routing: To save processing time, obtain any additional approvals before sending the completed requisition to Purchasing.
 - a. Send electronic PRs to purchasing@tricity.wsu.edu. This email is for PR submittal only.
NOTE: Only send the PR *once*, unless otherwise requested.
 - b. If the PR is requesting item to be purchased with grant budget (Programs 11-14), the grants office needs to review the request. You can send your request to them via email for approval at grants@tricity.wsu.edu.
 - c. PRs for advertisements need to be reviewed by WSUTC Marketing and Communication located in East 220, 2-7319.

NOTE: *Incomplete PRs will be delayed or returned to Requestor.*

8. Trademarks: PRs requiring the purchase of items with our WSUTC logo, artwork, graphic marks, etc. must be a Licensed Vendor to ensure we meet brand standards. You can find a licensed vendor list at the following link: <http://trademarks.wsu.edu/Vendors.html>.



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9. Status: It is the Requestor's responsibility to keep apprised of status with the vendor. Purchasing will assist by providing confirmation and forward any emails concerning the purchase to the Requestor.

10. Invoices: For prompt payment by Accounts Payable ensure the invoice contains the PO. Forward all invoices to WSUTC Accounts Payable Office 2-7379.



Attachment A Sample Purchase Request

NEW! a.k.a. RFP

For Purchasing only

TC#	PR EXAMPLE
PO#	PR EXAMPLE

PURCHASE REQUEST

CLEAR

CHECK ONE: PURCHASE ORDER PCARD IRI INVOICE VOUCHER CONTRACT Chose an action

NEED DATE: 10/08/15
VENDOR: Harney & Sons
ADDRESS: 15723 Route 22 Millerton NY 12546
EMAIL: customerservice@harneyteas.com
PHONE: 888.427.6398
WEBSITE: harney.com

REQUESTOR: Queen of Hearts
EMAIL: q.hearts@wonderland.com
PHONE: 509.947.0910
DEPT/GROUP: 509.947.0910

VENDOR ACCEPTS WSU: PCARD PO Verify what the vendor accepts. Utilize departmental PCARD where applicable & allowable.

BUDGET:

PROG	BUDGET	PROJ	OB/SUB	DIST (% OR \$)
xxx	xxxx	xxxx	xxxx	50%
xxx	xxxx	xxxx	xxxx	26.03

Totals for you

Incomplete Purchase Requests may be delayed or returned

ea, mi, hr, oz, lot, etc.

#	DESCRIPTION (CATALOG/PART #, SIZE, ETC.)	QUANT	UNIT	UNIT PRICE	AMOUNT
1	50513 Hot Cinnamon Spice 50 Sachets	1	ea	17.00	17.00
2	41760 African Autumn loose bag	1	ea	24.00	24.00
3					0.00
4					0.00
5					0.00
6					0.00
7					0.00
				Subtotal	41.00
				Shipping	
				SALES TAX (8.6%)	3.53
				Additional Page Total (w/TAX)	1.00
				GRAND TOTAL	\$ 45.53

Attach additional pages if necessary

Where applicable

CHECK ALL THAT APPLY:

- Food Purchase is for an "Open Event"
- Request to Serve Food & Roster

Sales tax applies to where the items are delivered.

If serving food, one of these should be checked

Insert total with tax from additional page(s) when applicable.

WHOWHAT: Mad Hatter Group, Tea Party Event

WHEN/WHERE: 11/01/15, CIC 120A

WHY (Expense Purpose/Justification):

To support student community outreach.

SPECIAL INSTRUCTIONS:

POs will be sent to all emails listed on PR

Send a copy of the PO to treasurer March Hare march.hare@wonderland.com. List of attendees (roster) will be submitted after the event.

APPROVED SIGNATORIES

I/we certify these expenditures are in compliance with all applicable WSU policies and regulations.

PRINCIPAL INVESTIGATOR/
APPROVING OFFICIAL:

Department/Budget Manager

Print/Type Name

Signature

Date

EXPENDITURE AUTHORITY:

Typically the Busn Svcs Office

Print/Type Name

Signature

Date

GRANT REVIEWER:

Grant Specialist

Print/Type Name

Signature

Date

NEW! Email for submitting PRs

Please send/scan completed Purchase Request and all supporting documentation to purchasing@tricity.wsu.edu