SOUTHEASTERN UNIVERSITY

GENERAL ADMINISTRATIVE POLICY

TITLE: Purchasing Requisition Procedure
POLICY NUMBER:
EFFECTIVE DATE:
REVISION DATE: 12/10/2009
ACCREDITATION STANDARDS:

POLICY:
Purchase requisitions shall be created and approved prior to purchase commitments and purchase orders being written.

PURPOSE:
To inform the Procurement Officer of departmental needs.
To provide guidelines for creating purchase requisitions.

SCOPE:
All University Department Heads and assistants

DEFINITIONS:

FORMS AND APPLICABLE DOCUMENTS:

PROCEDURES:

Listed below is a step by step process for entering a requisition into the purchase system.
1. Log in to the Jenzabar EX Suite 3 system using your assigned username and password and Click on "Login."
2. Click on "Business Office" module.
3. Click on the Purchasing module icon and then click on Create Requisition icon.
4. The Create Requisitions window will appear with a three tab requisition. Fill in the set Purchasing Preference Tab items, Purchasing Agent number, that is your six digit employee number, and the Ship Goods Here field, your department number. In the Approval Track field click on the drop menu and select the appropriate approval track. This completes the Purchasing Preference tab fields.
5. Click on Suggest a Vendor tab. Fill in the vendor field with the vendor number. If you don't know the vendor number, then type in the vendor name and select the vendor from the drop down list that appears.

If you do not see the name of the vendor, call Accounts Payable at x 5037.
6. Tab to the Account Number field and fill the field with the five segment account number.
7. Tab to the Unit field and enter the units, i.e. each, box, doz., etc.
8. Tab to the Quantity field and enter the quantity.
9. Tab to the Cost per Unit and enter the unit price.
10. Tab to the second Account Number field and enter the account number.
11. Tab to the description field and enter a brief description.
12. If you are requesting more than one item place the cursor in the description field and right click your mouse. A drop down menu will appear. Click on add a row and fill in the appropriate fields.
13. If you have more requisitions to create tab to the Save and Open New button and click it. A new blank requisition will appear. If you completed all your requisitions, click save and then click submit and you are finished.

Requests for payment of services made to individuals need to be verified by the Payroll office before creating a requisition. This is to verify if the individual is an employee at the time of payment. If the person is an employee, they must be paid through the Payroll system. In these cases, a Payroll Status Form is required. Payments to independent contractors, for professional services, or honorariums must include a valid address and a Federal identification number or a social security number.
All purchases which are treated as Florida sales tax exempt must be paid by check or the credit card of the exempt entity. Therefore, reimbursable cash, personal check, or personal credit card transactions cannot be considered as tax exempt. Violations of this State of Florida policy could jeopardize the tax-exempt status of the University.

APPROVAL:

APPROVAL:

DISTRIBUTION:
Campus Wide

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