

College Operating Procedures (COP)



Procedure Title: Request for Purchase
Procedure Number: 04-1011
Originating Department: Office of Financial Services

Specific Authority:

Board Policy 6Hx6:1.02; 6Hx6: 4.01
Florida Statute 287.017, 1001.02, 1001.03, 1010.04 6A-14.0734,
Florida Administrative Code

Procedure Actions: Adopted: 07/93; 06/09; 4/16/12; 1/08/13

Purpose Statement: A Request for Purchase often referred to as a Purchase Requisition must be made to Procurement Services to procure specified goods and services for all operating departments of the College. The purchasing function is centrally managed by Procurement Services to assure that the terms are negotiated in the best interests of the College and comply with sound purchasing practices, accounting controls, Department of Education rules and Florida Statutes.

Guidelines:

A Purchase Requisition is required prior to the issuance of a purchase order. Generally, a Purchase Requisition is required to request the purchase of all goods and services if, for a single purchase event, the aggregate exceeds \$250.00 and for all "standing purchase orders" except in the following circumstances:

- a) Travel related expenses which can be reimbursed via the Banner Travel and Expense Management Module.
- b) Registration fees for conferences and seminars for which payment is required in advance.
- c) Purchases by student clubs using agency (Fund 6) account funds.

The Vice President of Administrative Services or the appropriate vice president must approve any exception.

Procedures:

I. STANDARDIZATION

A. GENERAL

1. In the interest of quality and to minimize unnecessary effort, goods or services may be purchased via statewide, regional, combination of institutions or national buying consortia/cooperative competitively solicited agreements whenever the goods/services offered satisfies functional and educational needs.
2. Procurement Services will ensure, insofar as possible that the items requested are not over-specified but are appropriate to meet the functional and educational needs of the College.

B. COMPUTER HARDWARE AND SOFTWARE

All computer equipment, parts and software purchases which require installation, maintenance and service by the IT Department or which will have connectivity to a College Local Area Network (LAN) must be approved by the IT Department. The IT computer configuration or approval must be attached to the Purchase Requisition.

II. INITIATE THE REQUEST

- A. Each Purchase Requisition shall be initiated by the budget administrator or designee of the index/account to be charged. The request will be routed to the budget administrator for approval.

NOTE: Ordering items directly from a vendor without a properly authorized purchase order could result in the employee being subject to disciplinary action.

- B. So as not to cause added delay in the processing of requisitions, those personnel responsible for preparing the individual department's requisitions should be thoroughly familiar with purchasing procedures.

III. PREPARING THE PURCHASE REQUISITION GENERAL REQUIREMENTS

A.

1. The Purchase Requisition is submitted via the College's portal (Banner Self Service) under the District Resources tab within the Finance and Accounting – Banner section. If there is not sufficient budget, the requisition will not complete.
2. It is the responsibility of the requestor to give detailed and complete descriptions of each item requested. A "model" or "part" number by itself is not sufficient information to verify or secure price quotes. Include not only the model/part number but also be specific and include the name of the item and a brief description if applicable. Additional pertinent information that does not fit in fields provided should be forwarded to Procurement Services.

3. Price estimates, price quotes, related proposals, executed contracts, executed maintenance agreements and other applicable request for purchase support documentation should be provided to Procurement Services when the request for purchase is initiated.
4. Incomplete details will result in request for purchase being returned to requestor, thereby, causing a delay in processing the order.
5. Procurement Services will process requests in the order they are received except for those requests requiring special handling. If the request requires special handling due to an emergency or needs expediting, notify Procurement Services immediately. Poor planning does not constitute a need to expedite a request for purchase.
6. The following information should be included in the proper sections of the purchase requisition.
 - a. **VENDOR**

The suggested Vendor's name that is capable of supplying the requested goods/services should be provided to include a complete address, phone/fax number and email. This is only a suggested vendor and may be changed at the discretion of Procurement Services when in the best interest of the College.
 - b. **INDEX/ACCOUNT**

The Banner fund-org-prog is the Index against which the purchase is to be charged and the general ledger code against which the purchase is to be charged is considered the account code.
 - c. **COMMODITY DESCRIPTION**

Insert each good/service to be requested for purchase on a line under Commodity Description. The 'name' of the item to be purchased, including model, catalog or part number must be entered. If more than five line items are being requested, save the purchase requisition document as a template and provide additional line items in a second purchase requisition document and so on until all items are specified. Notify Procurement Services that multiple requisitions exist for one order enabling one Purchase Order to be created.
 - d. **UNIT OF MEASURE**

Indicate the unit of measure which identifies the packaging of the item being ordered. Units of measure can be found by using the drop down box provided.
 - e. **QUANTITY/UNIT PRICE/ADDITIONAL AMOUNT**

Insert quantity of each good/service being requested and the unit cost per item. This price must be the net discounted price per item

as discounts cannot be computed via Banner. Shipping or other applicable additional amounts should be indicated in column marked 'additional amount'.

f. Special instructions or other applicable information should be provided in the Comments or Document Text sections.

IV. BUDGET

If the Budget Administrator does not have sufficient funds in the index/account to pay for the purchase, a budget transfer must be completed online prior to the requisition.

V. SUBMIT TO PROCUREMENT SERVICES

- A. The completed Purchase Requisition will be routed through the approval queue process. If the purchase is questioned, the request will be forwarded to the Vice President of Administrative Services who will resolve the matter in coordination with the appropriate Vice President or Campus President.
- B. A certain amount of time is required to process a requisition. The approximate lead time required from receipt of requisition to issuance of purchase order will be 3 days.
- C. After prices and vendor information are verified, the requisition is processed into a purchase order and emailed, faxed, or mailed within 24 hours.