

INSTRUCTIONS: PURCHASE REQUISITION

General Information

Use this form to request goods or services from sources outside the University.

- Complete the **unshaded** portions only.
- Type or print.

For the current list of vendors Contracts, go to: www.yale.edu/purchase.

Requisitioner and Vendor Information

Enter the date the form is being completed, in the format DD/MON/YYYY (e.g. 23 / APR / 1999).

Requisitioner information: Enter in the spaces provided at the top:

- The requisitioner's full name
- The department name
- The street address, building number, and room number of the department office where a copy of the purchase order is to be sent

Delivery location: Enter the exact address (building and room number) where the item being requisitioned is to be delivered.

VIP No: If ordering against a contract, enter the departmental 10-digit VIP number.

Job No: Physical plant requisitions only. Enter the job number relating to the requisition.

Distribution Code: Enter the PTAE0 that the requisition will be charged against, as follows:

1. **Project:** 7-digit numeric code that identifies the particular research project, activity, program or function.
2. **Task:** up to 8-digit alphanumeric code that provides the detailed division and subdivision of the Project.
3. **Award:** 6-digit alphanumeric code.
4. **Expenditure type:** 6-digit numeric code that identifies the subdivision of the object code.
5. **Organization:** 6-digit numeric code identifying the location of the financial activity within the University.

Suggested vendor: If the requisitioner wishes to suggest a specific vendor, enter the vendor's name (and contact information, if known).

- If the suggested vendor has a contract with the University, provide the contract number.

Vendor set-up: Consult the web query tool to check on the status of the specified vendor.

- If the vendor is already set up in the vendor database, check YES.
- If the vendor is not in the database, check NO. Complete a Vendor Set-up Request form and submit it with the requisition.

Date required: Enter the specific date the item(s) will be required. Do **not** write "ASAP" or "rush." This should be the expected delivery date and will be the Expenditure Item Date (EID) entered into the system.

Start/End dates: For purchases related to a service contract, enter the start and end date of the contract.

Note to Buyer: Include any specific instructions or details regarding the purchase to the buyer in this space, including a request for invoice approval.

Ordering information

Description: Provide a detailed description of the good(s) or service(s) required.

- Include the vendor catalog number if applicable.
- If you have already received the merchandise, or have placed the order, write, "Confirming only. Do not duplicate order". Provide the vendor name, address, and date the order was placed.

Quantity: Enter the quantity being ordered.

Unit price: If you know the unit price, enter it in the "unit price" column.

- Enter the cost for one commodity in a unit underneath the "each" column, or the cost for one whole unit of a commodity under the "Lot" column.

Amount: Enter the total dollar amount for the quantity being ordered.

Notes/Special Instructions: Provide additional specific information to the buyer regarding the purchase as necessary. Include any **split distribution** instructions in this section, if you wish to charge more than one PTAE0 for the purchase.

Signature and Authorization: Sign the form, and have the requisition approved by an authorized departmental business manager or administrator.

Submit the Form

Send original requisition to the attention of the appropriate buyer at:

Purchasing Department
155 Whitney Avenue.
Phone: 203 432-9955, Fax: 203 432-9966

- For a complete list of authorized buying agents and their assigned commodities, go to: www.yale.edu/purchase

Retain copies 2 and 3 of the requisition for departmental records.