



REQUISITION GUIDE – PURCHASE OF GOODS OR SERVICES

The Purchasing process is divided into a Regular Purchase Order (PO) or Blanket Purchase Order (BPO) depending on what you are trying to purchase.

A. Regular Purchase Order (PO) - One-time Goods

B. Blanket Purchase Order (BPO) - Recurring purchases of Goods, Services, Subscriptions, or Licenses

C. Requisition Approval Path - Technology Related Procurement

A NEW REQUISITION MUST BE CREATED TO INITIATE YOUR PURCHASE.

How to create a Requisition: [Video Tutorial](#)

- To request a Change Order to an existing BPO: [TDX Change Order Request](#)
- To request a BPO Renewal: [TDX BPO Renewal Request](#)

A. REGULAR PURCHASE ORDER (PO)

STEP 1 - INITIATOR (DEPARTMENT)

1.	Obtains or receives a quote from the prospective vendor. Stable-price internet quotes are acceptable. Quotes must be current within 30 days.
2.	Confirm budget availability and submits budget transfer if necessary to Business Services.
3.	Verify that the vendor has a Vendor ID number in Colleague WebUI. If not, request via email from Purchasing Department by submitting the following vendor information: <ul style="list-style-type: none"> • W9 • Business Enterprise Certification (BEC) form • Vendor's contact information (Contact name, Phone number and e-mail)
4.	Initiate Requisition in REQM using the vendor ID number. See Video Tutorial Approvers must be Department Manager and Business Services Note: Requisition amount must match quote.
5.	Requisition number is generated upon completion. Email Department Manager to approve requisition. Provide requisition number and attach supporting documentation.
6.	Upon approval by Department Manager, forward email from step #5 to Business Services for approval.

STEP 2 – BUSINESS SERVICES

1.	The Business Services Supervisor validates Requisition. Checks for: <ul style="list-style-type: none"> • GL Account number • Funding • Appropriate use of funds • Supporting Documentation
2.	For Computer Equipment, include CTSS/ITSS manager as approver in REQM.
3.	IF APPROVED, Business Services will approve in REQM.
4.	IF REJECTED, Business Services will work with initiator for feedback and required documentation.



STEP 3 – PURCHASING

1.	Reviews email from Business Services and attached document package.
2.	Establishes a Purchase Order (PO)
3.	Sends copy of PO via email to: <ul style="list-style-type: none"> • Vendor & Initiator • Campus Business Services • Warehouse (If Applicable)

STEP 4 – RECEIVING OF GOODS

1.	Goods must be delivered to the Warehouse. Exceptions may apply. Warehouse will: <ol style="list-style-type: none"> 1. Obtain Packing Slip and check against PO. 2. If discrepancy/ damage, then resolves with vendor. 3. Sends Packing Slip (s) to Purchasing. 4. Tags item for inventory (if needed). 5. Delivers to Department.
2.	If the goods are delivered to the site (Department) Initiator (Department) will: <ol style="list-style-type: none"> 1. Obtain Packing Slip and check against PO. 2. If discrepancy/ damage, then resolves with vendor. 3. Sends Packing Slip (s) to Purchasing and Warehouse.
3.	Purchasing: <ol style="list-style-type: none"> 1. Confirm receipt of Packing Slip or proof of delivery. 2. Accepts PO in the system for payment by Accounts Payable.

STEP 5 – ACCOUNTS PAYABLE

1.	Receives invoice from vendor. Forwards invoice to initiator to obtain approval from the manager to approve payment. (invoice approved via wet signature or Adobe Sign)
2.	Initiator emails approved invoice to DO.AP@sjeccd.edu
3.	Accounts Payable creates voucher. Payment date is set for 30 days from INVOICE date.
4.	CHECK IS ISSUED AND SENT TO VENDOR

B. BLANKET PURCHASE ORDER (BPO)

STEP 1 - INITIATOR (DEPARTMENT)

1.	Obtains a quote/proposal from the prospective vendor. Supplies BPO do not require a quotes. Determine the appropriate contract needed. Reference: Purchase of Services – Chart of Required Documents A Contract and insurance are required when a vendor: <ul style="list-style-type: none"> • Is providing a service on or off campus. • Is to work independently and perform services with a specific scope of work for a set fee and within a defined period of time. Document package must include:
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	<ul style="list-style-type: none"> • Appropriate District contract or vendor agreement (Coordinate revisions to contract with District Office Risk Manager and Vendor if necessary) • Certificate of Insurance (Insurance Requirements) • Vendor quote or proposal (that supports the amount) • HECVAT – required for information technology purchases.
2.	Confirm budget availability and submits budget transfer if necessary to Business Services.
3.	Verify that the vendor has a Vendor ID number in Colleague WebUI. If not, request via email from Purchasing Department by submitting the following vendor information: <ul style="list-style-type: none"> • W9 • Business Enterprise Certification (BEC) form • Vendor’s contact information (Contact name, Phone number and e-mail)
4.	Initiate Requisition in REQM using the vendor ID number. See Video Tutorial Approvers must be Department Manager and Business Services Note: Requisition must mirror quote. Reference Purchasing Matrix .
5.	Requisition number is generated upon completion. Email Department Manager to approve requisition. Provide requisition number and attach supporting documentation.
6.	Upon approval by Department Manager, forward email from step #5 to Business Services for approval.

STEP 2 – BUSINESS SERVICES

1.	The Business Services Supervisor validates Requisition. Checks for: <ul style="list-style-type: none"> • GL Account number • Funding • Appropriate use of funds • Supporting Documentation
2.	For Computer Equipment, include CTSS/ITSS manager as approver in REQM.
3.	IF APPROVED, Business Services will approve in REQM.
4.	IF REJECTED, Business Services will work with initiator for feedback and required documentation.

STEP 3 – PURCHASING

1.	Reviews email from Business Services and attached document package.
2.	Establishes a Blanket Purchase Order (BPO)
3.	Sends copy of BPO via email to: <ul style="list-style-type: none"> • Vendor & Initiator • Campus Business Services • Warehouse (If Applicable)

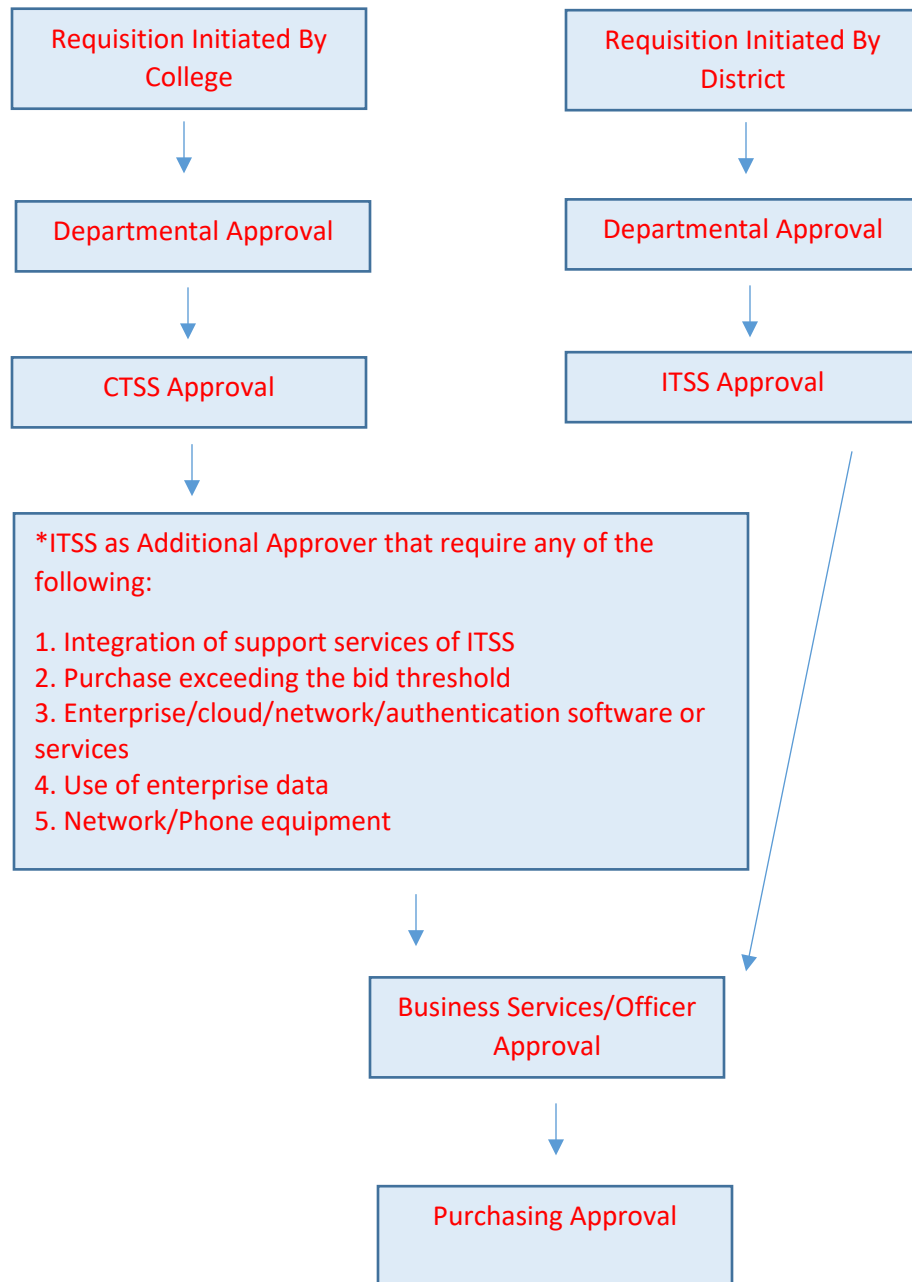
STEP 4 – ACCOUNTS PAYABLE

1.	Receives invoice from vendor. Forwards invoice to initiator to obtain approval from the manager to approve payment. (invoice approved via wet signature or Adobe Sign)
2.	Initiator emails approved invoice to DO.AP@sjeccd.edu
3.	Accounts Payable creates voucher. Payment date is set for 30 days from INVOICE date.
4.	CHECK IS ISSUED AND SENT TO VENDOR



C. REQUISITION APPROVAL PATH - TECHNOLOGY RELATED PROCUREMENT

* It is recommended that ITSS be contacted early and included in discussion with potential vendors about technology solutions impacting the listed criteria.



End of Requisition Guide