

PURCHASE REQUISITION

DEFINITIONS/INSTRUCTIONS

(in order of appearance on the Purchase Requisition and Addendum)

The Purchase Requisition form is used to request the acquisition of goods and services and should only be used by those Requisitioners who have not received training in TechMart, Caltech's e-Procurement system.

Use the definitions/instructions below and mail the completed Purchase Requisition and Addendum form (if applicable) to Procurement Services at M/C 103-6. If you have any questions, please call the Procurement Services Hotline at (626) 395-8900.

Note: It is extremely important that you utilize this form, as is, without any modification whatsoever. This form contains particular information Purchasing Services needs in order to process your order quickly and effectively. Any deviation may result in delay of purchase.

Date	Date Purchase Requisition is prepared
Requisition No.	For Purchasing Services Department use only
Change Order No.	Change Order/Modification number being issued to an existing Purchase Order
Department Name	Name of the department issuing the Purchase Requisition
Department Code	The code assigned to your Division/Department or a subsection that identifies how you want deliveries and paperwork routed. This code is assigned by the Purchasing Services Department in collaboration with Division/Department representatives. If you have questions about the Department Code, please refer to the Procurement Services web site address http://procurement.caltech.edu/support/departmentcodes.shtml
Purchase Order No.	Assigned by the Purchasing Services Department unless you are issuing a Change Order/Modification to an existing Purchase Order
Reimbursement to Caltech Student or Employee	Check this box if you are submitting receipt(s) along with your Purchase Requisition for reimbursement to a Caltech student/employee
Blanket PO Change Order/Modification	Check this box if you are requesting a Change Order/Modification to an existing Blanket Purchase Order. Note: New Blanket Purchase Orders should be initiated using the Blanket Order Requisition form. Please refer to http://procurement.caltech.edu/purchasing/purchasingforms.shtml
Date Stamp	For Purchasing Services Department use only
Supplier Name	The name of the Supplier to whom the Purchase Order should be issued
Caltech UID Number	University Identification Number
Address	Supplier's address
City	Supplier's city
State	Supplier's state
Zip	Supplier's zip code
Phone (Supplier)	Supplier's phone number, including area code

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Fax (Supplier) Supplier's fax number, including area code

Supplier Contact Supplier's Caltech Account Representative or person with whom you are working

Tax Reportable/Withholding

Complete this section on the Purchase Requisition Addendum the first time you use this supplier to provide services and/or to make payment for rents

Is Supplier a U.S. Citizen/ Resident Alien? Check applicable box. Used to determine which, if any, tax reporting forms are required by the IRS

Is Supplier a Caltech Student or Employee? Check applicable box. Used to determine appropriate payment method

Do you expect to pay Supplier \$1,500 or more during this calendar year? Check applicable box. Used to determine if California State non-resident withholding is required

If Supplier is Providing Services, where will the Services be Performed? Check applicable box. Used to determine tax reportable status and/or withholding requirements

Screening Certification

Complete this section on the Purchase Requisition Addendum if the requisition includes a single item of equipment \$10,000.00 or over, which is partially or wholly Federally funded

Disposition of Check

The location and method you would like the Supplier's check to be sent/picked up

U.S. Mail Check this box if you want the Supplier's check to be mailed via U.S. mail to Supplier's address

Direct Deposit Check this box if you want the Supplier's payment to be electronically deposited into their bank account. Supplier must be enrolled as a direct deposit participant. See <http://procurement.caltech.edu/payment/disbursementdirectdeposit.shtml> for more information

Project Project number(s) to be charged

Task Task number(s) to be charged

Award Award number(s) to be charged

% or \$ Indicate with percentage(s) or dollar amount(s) the distribution of funding you want each Project-Task-Award and/or Expenditure Type to be charged

Expenditure Type Expenditure Type you would like this order to be charged against. For a listing and/or definition of Expenditure Types, refer to https://fiji.caltech.edu:9013/pls/CNTRL/CITWA_ETD_EXP_TYPE_V_PKG.startup

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For equipment purchases, please refer to
<http://procurement.caltech.edu/property/>

Part Number	Supplier part number (if applicable)
Item Description	Describe as completely as possible the goods/services you are ordering
QTY	The quantity (number) of items being purchased
UOM	Unit of Measure (i.e. Each, Box of 10, Hour, etc.)
Item Price	The price per each Unit of Measure
Line Total	The QTY multiplied by the Item Price. Only the Excel version of the Purchase Requisition automatically calculates the Line Total(s)
Order Total	The sum of "Line Total" fields. Only the Excel version of the Purchase Requisition automatically calculates the Order Total
Note to Buyer	Provide any additional information here (i.e. delivery instructions, payment instructions, etc.)
Need By Date	Date the goods/services is needed by the Requestor. Be as specific as possible and avoid use of A.S.A.P.
Preparer	The name of the person preparing the Purchase Requisition. Documentation relating to the order will be sent to this person
Phone (Preparer)	Preparer's phone number
Mail Code (Preparer)	Preparer's Caltech mail code
E-Mail (Preparer)	Preparer's e-mail address
Requestor	The name of the person requesting the goods/services
Phone (Requestor)	Requestor's phone number
Mail Code (Requestor)	Requestor's Caltech mail code
E-Mail (Requestor)	Requestor's e-mail address
Approver	Person authorized to approve expenditures on the account(s)
Phone (Approver)	Phone number of person authorized to approve expenditures on the account(s)
Mail Code (Approver)	Mail Code of person authorized to approve expenditures on the account(s)
Approver Signature & Date	Signature of person authorized to approve expenditures on the account(s) and the date they sign the Purchase Requisition. By signing, the Approver acknowledges that the equipment/supplies/services being purchased are needed to accomplish research/teaching objectives, consistent with the requirements of the POETA(s) listed on the Purchase Requisition