



D SUNY
DOWNSTATE
Medical Center

Completing a Purchase Requisition


Purchase Requisition Guide

If your department has not yet transitioned to entering requisition directly into the Lawson system, your procurements will start with the standard State Purchasing Requisition form (download form to your hard drive, then complete **(MUST be typed)**, save and print for signature before submitting to Procurement Office.

Plan in Advance: When requisitioning any item that involves any incoming shipment to DMC (any funding source), be sure you are familiar with DMCs incoming shipment requirements. Plan the purchase so that your department is able to accept a shipment upon its arrival to DMC, including having the space to receive the shipment upon its arrival. Shipments are NOT to be left on the Central Receiving loading dock overnight or stored in any location that presents a fire code violation. More detail at [Central Receiving Incoming Shipment Requirements](#).

The instructions below are generic. Requisitions for certain commodities require additional details on the form – see [General Procurement Requirements](#).

Purchase Requisition



① PAGE 1 OF 1

AGENT: [Grey Box] PO#: [Grey Box]

SUNY HEALTH SCIENCE CENTER AT BROOKLYN

PURCHASE REQUISITION ⑤

☐ EXTERNAL VENDOR
☐ INTERNAL RECHARGE

DATE 1/10/06 ② DEPT Contracts ③ HSCB BOX # 63 ④ REQ 1 8 4 6 5 0 3 9

SUGGESTED SUPPLIER United Supply Corp. ⑥		REQUISITIONED BY: NAME Jane Doe ⑦	TEL: (718)270-0000	BOX: 63
ADDRESS 250 44th Street		FINAL DELIVERY POINT (BLDG. ROOM) 150 East 34th Street – Room 100 ⑧		
CITY Brooklyn	STATE NY	ZIP 11232	TEL. # (888)439-9387 ⑨	DATE 1/13/06

ITEM	COMPLETE DESCRIPTION & SPECIFICATIONS <small>ATTACH ANY & ALL JUSTIFICATION LETTERS</small>	QUAN.	UNIT	PRICE PER UNIT	TOTAL
⑩	⑪	⑫	⑬	⑭	
1	7 Gal Plastic Waste Basket Color Black #UNV-29901	2	EA	\$5.82	\$11.64
2	7 Gal Plastic Waste Basket Color Beige #UNV-29902	3	EA	\$5.82	\$11.64
3	Sharp Calculator (2 Color) #SHR-EL1192BL	2	EA	\$69.95	\$139.90
USE CONTINUATION FORM IF MORE SPACE IS REQUIRED					TOTAL ⑮ \$163.18

CHECK POINTS SAMI _____ PC _____ Pre enc. _____ COMMENTS _____	CHARGE TO			AUTHORIZED SIGNATURE <i>Jane Doe</i> ⑯ Director of Procurement TITLE <i>John Doe</i> AUTHORIZED SIGNATURE [WHEN SECOND SIGNATURE IS NEEDED] Assistant Vice President of Materials Management TITLE
	ACCOUNT CODE	OBJECT CODE	AMOUNT	
	⑰ 860760	⑱ 3001	⑲ \$163.18	
	VENDOR TAX ID NUMBER			

DISCT. _____ FOB SHPG. PT. _____ FOB DEST. _____ PURCHASING AGEN _____ DATE _____	BATCH TYPE _____ COMMODITY GROUP NUMBER ⑳ 22 CONTRACT NU ㉑ 23
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Form Field Descriptions

1. Page _ of _ :

- Use Numeric values only. The total number of pages should reflect any Requisition Continuation form or attachments that you add (vendor proposals, quotes, etc.)

2. Today's Date:

- The date you are completing the form (does not always mean this is the date your submitted it to Procurement Office)

3. Department Name: MSC Number:

- The requisitioning department's name .

4. Mail Stop Number:

- The department's main office DMC Mail Stop Code (previously know as "DMC Box number)

5. Requisition Number: DMC's format is YY-PID-XXX

- YY – Last Two Digits of fiscal year **end** being charged. For example, for procurements being charged to the Fiscal Year 2016-2017 ending June 30, 2017, the PID is 17
- PID (Purchasing ID #) – Procurement assigned each department a 3 digit purchasing ID number for all your departmental purchase requisitions, regardless of the specific departmental account # which will fund this procurement.
- XXX – Each new fiscal year, this number begins with 001 and continues sequentially up to 999.
- Suffix – A, B, C etc. used when a department is submitting any subsequent Purchase Order change order needs through the year that are tied to the original requisition (i.e.: a revision to previous requisition number) such as adding additional funds, adding additional one items, etc.

6. Suggested Supplier:

- While the requisitioner can suggest a supplier, only an Official DMC State Procurements Officer can determine the final vendor to be awarded the actual Procurement.

7. Requisitioned By:

- Your Name, DMC Mail Stop Code (previously called box#) and Direct Telephone Number.

8. Final Delivery Location:

- **MUST** be the final internal destination Building and Room number that shipment(s) is to be delivered to by DMC Central Receiving after its dock arrival



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Form Field Descriptions cont'd

9. Quote By: Can be generic such as “catalog” or “website” but **IF** you have based your requisition on a formal quote you obtained from a specific vendor, provide the additional details:

- Vendor Representative Name
- Date of Quote (date that quote was obtained)
- Telephone Number for that Vendor Representative

Any documented quote (hard copy or printed eMail) you received must be attached to the requisition when submitting it to the Procurement Office (MSC 63).

10. Item Column:

- Use Numeric Values only, Starting with “1”, proceeding with “2”, “3” etc. for each new item. Leave blank if the row is a continuation of the preceding item description.

11. Describe your Purchase:

- In as much specificity as practical and possible. An item can be described on multiple rows when more space is required for that item. The more detail, the better as this greatly assists expediting the procurement process. The assigned Purchase Agent often does not know your prior history needs, delivery deadlines, time periods covered, etc., unless it is on the requisition you submit. Having as much information as practical on your requisition helps prevent delays in processing your requisition. Review the [General Procurement Requirements](#) to be sure that the description covers any additional information required for that commodity.

12. Quantity Column:

Use numeric values only. Can be decimal values if applicable.

13. Unit Column:

The unit measure that the item is procured in. Typically: ea (each); case (cs); bx (box); dz (dozen); inches (in); feet (ft), lot, vial, etc.

14. Price Per Unit Column:

- Numeric values only (dollars and cents). If fraction of cents is used, auto-calculation will be exact as entered, but will be **viewed** in nearest whole cents.
- **The eForm auto-calculate the total for each row (unused lines will appear as \$0.00) and will summarize all rows in the Grand Total of this section. Dollar Total will round to the nearest whole cent.**



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Form Field Descriptions cont'd

15. Charge To:

- An unlabeled field at top of this section can be used to specify non-state funding sources (s), if applicable.

16. Account Number:

- Numeric values ONLY. Insert the complete 8-digit State Account Number 123456-78. All requisitioners are expected to KNOW their full 8-digit account number(s). If you put only 6 digits (the old method in past years), your requisition will be rejected or delayed to look up the last two subaccount digits.

17. Object Code:

- Numeric values ONLY. The SUNY Expenditure Code associated with the item(s) being procured – see [Object Code List](#).

18. Amount:

- Numeric values only (dollar and cents). The dollar amount to be charged to each account number. The total amount of all accounts being charged must equal the requisitions Grand Total.

19. Vendor Tax ID Number:

- If you know the suggested vendor's **Federal Tax ID number** or **NYS Vendor Number**, insert it in this section. This assists expediting the procurement process (otherwise the agent needs to look it up).

20. Signatures:

- Your department head previously provided Procurement Office with their authorized signature requirements. Your account may require two or more approval signatures based on its total dollar threshold. If unsure, ask your department head and have all required signatures before you submit the requisition.
- If the commodity or service you are requesting require [additional approvals](#) from other DMC departments (FM&D, SMIC, InfoSvcs, etc.), obtain those signature in advance. This avoids having your requisition rejected or delayed for additional signatures.

21. Comments and Special Instructions: Use this section to give any additional processing instructions or comments to the Purchasing Agent.

- For orders involving a Shipment to DMC, be sur to give the vendor [DMC's Incoming Shipment Requirements](#).



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Form Field Descriptions cont'd

22. Commodity Group Number (if know):

- If you know the NYS-OGS commodity group number of the items being purchased, fill in that number. This greatly assists expediting the procurement process.

23. Contract Number:

- If you have suggested a vendor who has a valid DMC Contract of NYS-OGS Contract (OGS Contract Vendor), fill in the Contract Number. This greatly assists expediting the procurement process.

24. Continuation Sheet(s): When more than 10 rows/items are being ordered, the [Purchase Requisition Continuation form](#) becomes necessary:

- On the original (page 1) Requisition Form, enter nine items and temporarily leave the eleventh row blank, then continue with completing any needed continuation sheet(s).
- Once you have subtotals on each continuation sheet, you go back to the original (page 1) requisition, the eleventh row is then entered as “subtotal from the continuation sheet(s) and entered as qty = 1 LOT with the Total dollar amount of all continuation sheet and insert that total dollar amount on eleventh row of the original requisition form. Thus, the original requisition Page 1 Grand Total Dollar amount will then reflect the true requisition total dollar, including any/all continuations sheets.



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Form Field Descriptions cont'd

- Please type all info on requisitions so it is legible.
- It is important to complete a requisition in its entirety and with comprehensive information.
 - It could make the difference in your purchase being delayed or in obtaining the wrong or incomplete service/product.
- Make sure you have obtained the correct signatures before forwarding to the Contract & Procurement Department.
 - If the proper authorizing signatures are not on the requisition when Purchasing receives the requisition, it will be returned to the department to obtain them. This will also delay your purchase..