Number:	602
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Supersedes:	
Page:	1

Administrative Procedure

Subject: PURCHASE REQUISITIONS

1.0 PURPOSE:

To establish procedures governing procurement of materials, supplies, equipment, and services.

2.0 ORGANIZATIONS AFFECTED:

All business units of the University, excluding Auxiliary organizations.

3.0 REFERENCES:

3.1. Education Code, Sections 89005.5, 89006, 89036, 89038, 89045, 89048(d), 89900, and 89909.

3.2. Government Code, Sections 1090, 4530 et seq., 7070 et seq., 8355–8357, 8546.7, 11135, 11256-11263, 12990 et seq., 13332.09, 14825 et seq., 14850, 81000 et seq., 87100, 87103, and 89503.

3.3. Public Contract Code Sections 1600, 1601, 6108, 7110, 10111, 10115 et seq., 10286 et seq., 10334, 10339, 10340(b)(3), 10830, 10831, 10832, 10833, 12102(b), 12120, and 12153-12217.

3.4. State Administrative Manual (SAM), Sections 2800 ff, 3503-3506.

3.5. Integrated California State University Administrative Manual (ICSUAM), Sections 5000-00 through 5707-00

3.6. CSU Coded Memo AA-2007-04, Access to Electronic and Information Technology for Persons with Disabilities.

3.7. CSU Executive Order 750, Provision of Services Executive, and Implement Contracts for the Performance of Services by the Campus.

3.8. CSU Executive Order 760, Procurement Cards.

3.9. CSU Executive Order 775, Acquisition of Personal Property and Services.

3.10. CSU Executive Order 842, Competitive Bidding of Goods and Services.

3.11. CSU Executive Order 862, Information Technology Project Management.

3.12. Executive Order 926, the CSU Policy on Disability Support and Accommodations

3.13. CSU Executive Order 1000, Delegation of Fiscal Authority and Responsibility.

3.14. CSU Executive Order 1069, Risk Management and Public Safety.

3.14. Administrative Procedure 005, University Publications.

3.15. Administrative Procedure 604, Contractual Agreements.

3.16. Administrative Procedure 609, Information Technology Procurement Approval.

3.17. Administrative Procedure 603, Procurement Card.

4.0 POLICY:

4.1. The University has established a centralized purchasing system to assure conformity to State and California State University purchasing regulations.

4.2. A properly executed purchase order issued by the staff of Procurement and Contracts is the only authority for any vendor to deliver goods and/or services to the University. The sole exception to this Section is the campus procurement card that is managed by Procurement and Contracts. See AP 603.

4.3. Prohibited Practices - No University employee will derive any personal benefit from the use of state facilities for the purchase of equipment, supplies, or commodities.

Use of University purchasing procedures to obtain property for personal use, or misrepresentations to vendors that personal purchases are for the University for the purpose of obtaining price discounts, will expose employees or officers to prosecution under Penal Code provisions relating to embezzlement and theft.

Splitting of purchases in order to avoid the competitive bidding requirements prescribed by Law is prohibited under any circumstances.

4.4. It is the policy of the California State University (CSU) that all interested vendors have the opportunity to participate in the provision of the goods and services required by the University, subject to the procedures of the CSU.

4.5. The University will maintain a list of individuals who are authorized to approve contractual documents and a sample of their approval signature.

5.0 DEFINITIONS:

5.1. Online Requisition - Submitted through PeopleSoft to transmit a purchase request from the operating unit to Procurement and Contracts.

5.2. Purchase Order - Official document used by Procurement and Contracts to place an order with a manufacturer, wholesaler, retail vendor, or contractor.

6.0 RESPONSIBILITIES:

6.1. Requesting Departments will:

6.1.1. Complete an online requisition to request the purchase of materials, supplies, equipment, and services.

6.1.2. Obtain authorization from the Approving Official.

6.2. Procurement and Contracts Department will:

6.2.1. Receive and review online requisitions and forward them to the appropriate buyer. This will be done by the director or designee.

6.2.2. Establish final dates toward the end of the fiscal year for the submittal of requisitions to ensure processing by fiscal year-end.

6.2.3. Assist departments in the accurate completion of requisitions and return forms that require substantial modification to the requesting units.

6.2.4. Determine if competitive bidding is required on the requested items or services.

6.2.5. Obtain bids as required and make strong efforts to solicit quotations from Small Businesses and Disabled Veteran Business Enterprises.

6.2.6. Ensure that all required forms submitted have appropriate approval signatures. Required forms and approvals may include, but are not limited to, Risk Management/Environmental Health, & Safety, ITS Procurement Approval Request, E&IT Procurement Approval Request, and Voluntary Product Accessibility Templates (VPATs).

7.0 PROCEDURES:

7.1. Requesting departments will submit an online requisition through PeopleSoft ensuring that all required fields are completed. The following information should be included on the requisition.

a. Suggested source of supply.

b. Vendor's name, address, and zip code.

c. Date the request is prepared.

d. Name of the requesting department.

e. Requisition number.

f. Date needed. A specific date should be inserted. Use of the term "ASAP" is not acceptable date format.

g. Quantity of each item required, using either commercially accepted terms for the commodity described or the units shown in the vendor's catalog.

h. Complete and accurate description of each item requested. Indicate catalog reference, manufacturer and model number whenever possible. Include specifications and/or justification, when required.

i. Cost per unit.

j. Sub-total, sales tax, and total of other charges.

k. Name and extension of individual preparing the request.

l. Building and room to which the items are to be delivered.

m. Account number to be charged or equipment account number, if required.

7.2. The buyer assigned to the requisition will review the request and issue a purchase order directly to the vendor, if appropriate, and the requisition approving official.

7.3. The buyer(s) will determine if competitive bidding is required pursuant to ICSUAM Sections 5000.0 to 5707.0.

8.0 APPENDICES:

N/A