

Guidelines on Completing Shepherd University Purchase Requisition

The Shepherd University Purchase Requisition is required to be completed in line with the Shepherd University Procurement to Pay Process. The following are guidelines to assist in completing the form.

1. **Date/Fiscal Year:** Please enter the current date (date the form is being completed) and the budget fiscal year in which the expense is to be expensed.
2. **Suggested Vendor:** Please enter the suggested vendor name and contact information. (There is no need to complete the Vendor ID Number).
 - a. If this is a new vendor to which we will be issuing a check, a W9 will need to be submitted along with this form.
 - b. Feel free to include an email address instead of a fax number if available.
3. **Type of Purchase:** Either STANDARD or P-CARD MUST be selected.
 - a. Standard: A check will be issued as the vendor does not accept credit card payments, assess a fee for credit card payments, or the payment is for a service against a master contract and check payments are processed for tracking purposes.
 - b. P-Card: A purchase that will be made utilizing a Shepherd University P-Card.

Please also select one of the below if applicable:

- a. Agreement: A service and/or repair in which an agreement between the vendor and Shepherd University will need to be executed.
 - b. Contract: A purchase against an already established contract.
4. **Grant Funds:** If grant funds are to be used for the purchase please indicate such, by selecting "Y".
5. **Department Contact:** Please enter the individual that should be contacted with questions regarding the purchase and to whom the approved requisition should be sent once processed in the Department Name, Department Contact and Extension fields.
6. **Ship To:** Be sure to include the name and department that any commodity items should be shipped to. The Ship To address for all commodity items should be: 308 N Princess Street, Shepherdstown, WV 25443.
7. **Source of Price Estimate:** Please be sure to indicate the source of the price estimate. (Examples include: quote, shopping cart, agreement.) If the source of the price estimate is a quote, please enter the quote number in the Quote Number field.

8. **Signatures Required:**

- a. If the purchase **requires ELT approval**, the signature of the VP/ELT member is required as Major Administrator in addition to the signature of the Dean/Director/Budget Manager or his/her designee as the Org Administrator.
- b. If the purchase **does not require** ELT approval, only the Dean/Director/Budget Manager or his/her designee needs to sign as the Org Administrator.

Please Note: If a Dean/Director/Budget Manager is designating another individual to sign on his/her behalf, this must be on file with Procurement Services.)

9. **Purchase Details:** In this section, please itemize the quantity, description and unit price for all items to be purchased.
 - a. "See Attached" is acceptable if the attached documentation itemizes the items to include the quantity needed, item description (including item number if applicable), and unit and extended prices.
10. **Business Purpose:** This is a required field. Please detail the business purpose of the expense. General guideline for an appropriate business purpose is that it should indicate the "why" it is being purchased and/or "how" it is being used for Shepherd business.
11. **Funding Information:** Please indicate to which budget(s) the purchase should be charged if approved. ***PLEASE NOTE: Budget monies must be available in each Fund, Org and Account listed in order for the requisition to be approved.***

You have now completed the requisition form. Completed requisition forms with required supporting documentation may be submitted to Procurement Services via email to: purchasereq@shepherd.edu.