

# 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.

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<b>Date</b>	Date Purchase Requisition is prepared
<b>Requisition No.</b>	For Purchasing Services Department use only
<b>Change Order No.</b>	Change Order/Modification number being issued to an existing Purchase Order
<b>Department Name</b>	Name of the department issuing the Purchase Requisition
<b>Department Code</b>	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 <a href="http://procurement.caltech.edu/support/departmentcodes.shtml">http://procurement.caltech.edu/support/departmentcodes.shtml</a>
<b>Purchase Order No.</b>	Assigned by the Purchasing Services Department unless you are issuing a Change Order/Modification to an existing Purchase Order
<b>Reimbursement to Caltech Student or Employee</b>	Check this box if you are submitting receipt(s) along with your Purchase Requisition for reimbursement to a Caltech student/employee
<b>Blanket PO Change Order/Modification</b>	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 <a href="http://procurement.caltech.edu/purchasing/purchasingforms.shtml">http://procurement.caltech.edu/purchasing/purchasingforms.shtml</a>
<b>Date Stamp</b>	For Purchasing Services Department use only
<b>Supplier Name</b>	The name of the Supplier to whom the Purchase Order should be issued
<b>Caltech UID Number</b>	University Identification Number
<b>Address</b>	Supplier's address
<b>City</b>	Supplier's city
<b>State</b>	Supplier's state
<b>Zip</b>	Supplier's zip code
<b>Phone (Supplier)</b>	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](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/>

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