

Procedure Title	Purchasing - Requisitions		
Date of Issue	November 25, 1998	Related Policy	BP 3501-D
Revision Dates	June 12, 2013; November 29, 2017	Related Forms	
Review Date		Originator	Administrative Council
References			
AP 3501-D "Purchasing – Procurement Guidelines"			

1.0 PROCEDURE

- i) A Purchase Requisition is a formal request for something needed, a necessity or requirement. This request can be for things such as but not limited to goods and/or services.
- ii) Purchases made by means of a "Purchase Requisition" whether it be "electronic" or "form", must include all possible specifications, catalogue numbers, supplier's name and address, budget account number and pricing. Each school/department has a support staff with the capabilities to enter an electronic requisition in the respectable finance system.
 - a) Requisition "FORM" – to be filled out by each individual completely and receive the appropriate signature for approval. The requisition form can then be forwarded to the support staff to enter the electronic requisition.
 - b) Requisition "ELECTRONIC" – Is entered into the secured financial system by the support staff with login privileges. Upon completion the electronic requisition is forwarded to the appropriate authorized approver, as outlined in AP 3515-D "Purchasing - Segregation of Duties & Approval Authority Schedule", then to the purchasing department to be processed into a purchase order.
- iii) The Purchasing Department may change the originator's specification if the item is no longer available, or if another manufacturer or model might possibly fill the requirement to better advantage, either in end use or price. In such instances, the originator will be consulted.

1.1 Instructions for Completing Purchase Requisition Order Forms

When completing the form, please note the following points:

- a) Administrator must ensure that the "Budget Account No." is fully completed before approving.
- b) The "Vendor/Supplier" on the requisition form is to be completed fully for supplies, library, textbooks, etc.
- c) Complete fully the school name, street address and department (if necessary).
- d) Complete the order with full specifications.
- e) All purchase requisition forms must be priced including all applicable Sales Tax and the ending total. If the actual prices are not available, then estimated prices must be provided.
- f) The completed requisition form is given to the appropriate support staff to enter electronically
- g) The shared purchasing services will convert the electronic requisition into a purchase order and send to the vendor once all electronic approval requirements have been met.

NOTE: If the above procedures are not followed, the purchase requisition form will be delayed until all information is received.

1.2 Goods/Service Requiring a Requisition

The following items and/or services must follow normal Purchasing Procedures and require a purchase requisition:

a) Emergency Purchases

Applies when an Administrator, Manager or Superintendent verifies that the procurement of goods and/or services is necessary to prevent, or correct a dangerous or potentially dangerous safety condition, further damage, threat of an impending situation which may affect the environment, the life, safety, health and/or welfare of students, staff and/or the general public. Once the emergency has been taken care of a confirming purchase requisition will be required and procurement threshold procedures to be followed. (See section 5.0 of AP 3501-D "Purchasing – Procurement Guidelines").

b) Purchasing Items on Approval

When purchasing items on approval for preview, eg. books, kits, etc. the Administrator must follow the normal purchasing procedures and submit a requisition. There must be a note on the requisition indicating the items are for "approval" and must indicate "right of return" on Purchase Order. If items are returned, please advise the Shared Purchasing Services. If goods are returned charges may be applied by the supplier. The person requesting the purchase is responsible for returning the material.

c) Equipment Rentals

- i. Long term rentals are not encouraged. It is the responsibility of the Administrator to obtain competitive prices for long term rental equipment and then submit a proposal to the Shared Purchasing Services prior to any long term rental commitment being made.
- ii. Short term rentals must be covered with a Purchase Order.

1.3 Scheduling

Allow sufficient time for the purchase requisition to be processed, goods ordered and delivered. In a period of short supply, items may take eight to ten weeks to be delivered. Plan ahead to ensure that there will be no interruption in the program or project.