KSU Requisition Checklist

The purpose of this job aid is to provide a quick reference and overview to ensure all essential tasks are completed upon having a purchase order sent to the appropriate designated signature authority, and finally sent to the end user and supplier.

Special Request (Req) Checklist

Review	Task Completed?
The best practice is to use established University or State contract before purchasing from non-contracted suppliers. Ensure that the price on the quote is verified and matches the ePro requisition total dollar amount.	☐
Ensure all applicable approvals have been received. Approvals include Department, Project Manager, UITS, Design, Facilities, EHS, and/or HR.	☐
The Requisition Name should have a combination of the Purchase and Supplier Name and should be marked appropriately for special circumstances when applicable. (For example: OTF, OTF Hold, CR [contract review], Change Order). **When making research-related purchases, we must now include R2 in the name, regardless of whether a research speed chart is used or not.** *Example for a research-related purchase of a Robotic Machine: R2 Robotic Machine A&E BOT, Inc. (if character space allows)* *Example for a research-related purchase of a Robotic Machine with One Time Funding: R2 OTF Robotic Machine A&E BOT, Inc. (again, if space allows)*	☐
Ensure all appropriate documents/relevant supporting documents are attached. These include: a valid quote, contracts, renewal amendments, approval e-mails, eVerify (if service over $2,499.99), and Certificates of Insurance (COI).	☐
Include Approval Justification information to show what's being purchased, the purpose, who will use or consume goods/services, who requested purchase, and who approved. *Example: MacBook Pros order for Procurement and Payment Services for staff use. Requested by Director (name) and Approved by Executive Director (name).*	☐
Ensure the Item Details, Supplier, and *Additional Info sections are completed. *The Additional Info section is for comments about that *specific line item only.*	☐
Ensure the NIGP code(s) have been verified on the **NIGP list**.	☐
Ensure the Accounting Lines have the correct Account Number(s), Chart Fields (excluding 132100, 753000, 753100), and if applicable, Asset Account Numbers.	☐
Ensure to add the Unit of Measure (UOM) (1 quantity), Amount Only, Receiving Required, and Ship To for furniture, when applicable.	☐
For purchases between $10,000 and $24,999.99, the requesting department should obtain competitive pricing in the form of three quotes, or provide documentation for sole source if the item(s) is only available from two distributors.	☐
If the quote/proposal/order form or contract have terms and conditions, it may need to be submitted to the Contract Management System (CMS) for legal review and other approvals.	☐
Ensure the supplier is an approved vendor with a valid Supplier ID Number. If they are not registered, visit **Vendor Registration** for more information.	☐

**Ensure that all parties who need notifying are included in the requestor comments; also, provide the email address for the vendor/supplier for PO release. KSU Purchasing Manual for reference Purchasing Manual