Form 3201 Purchase Requisition FR.01 – Instructions

Revision Date: 2/14/2008

Use this form to request goods or services from sources outside the University.

- Complete the unshaded portions only.
- Type or print.

For the current list of vendors Contracts, go to: www.yale.edu/purchase.

Initiator/Vendor Information

Enter the date the form is being completed, in the format DD/MON/YYYY (e.g. 15/FEB/2008).

Initiator: The person who requests the good or services and who determines that the costs are reasonable and allowable on the award being charged. If only one person requested the goods/services, print name and NetID.

Enter in the spaces provided at the top:
- The initiator’s full name and NetID
- The department name
- The street address, building number, and room number of the department office where a copy of the purchase order is to be sent.

Delivery location: Enter the exact address (building and room number) where the item being requisitioned is to be delivered.

VIP No: If ordering against a contract, enter the departmental 10-digit VIP number.

Job No: Physical plant requisitions only. Enter the job number relating to the requisition.

Distribution Code: Enter the PTAE0 that the requisition will be charged against, as follows:
1. Project: 7-digit numeric code that identified the particular research project, activity, program or function.
2. Task: up to 8-digit alphanumeric code that provides the detailed division and subdivision of the Project.
3. Award: 6-digit alphanumeric code.
4. Expenditure type: 6-digit numeric code that identifies the subdivision of the object code.
5. Organization: 6-digit numeric code identifying the location of the financial activity within the university.

Suggested vendor: If the requisitioner wishes to suggest a specific vendor, enter the vendor’s name (and contact information, if known).
- If the suggested vendor has a contract with the University, provide the contract number.

Vendor set-up: Consult the Procurement Inquiry tool to check on the status of the specified vendor.
- If the vendor is already set up in the vendor database, check YES.
- If the vendor is not in the database, check NO. Complete a Vendor Set-up Request form and submit it with the requisition.

Date required: Enter the specific date the item(s) will be required. Do not write “ASAP” or “rush.” This should be the expected delivery date and will be the Expenditure Item Date (EID) entered into the system.

Start/End dates: For purchases related to a service contract, enter the start and end date of the contract.

Ordering information (middle of form)

Quantity: Enter the quantity being ordered.

Unit price: If you know the unit price, enter it in the “unit price” column.
- Enter the cost for one commodity in a unit underneath the “each” column, or the cost for one whole unit of a commodity under the “Lot” column.

Description: Provide a detailed description of the good(s) or service(s) required.
- Include the vendor catalog number if applicable.
- If you have already received the merchandise, or have placed the order, write, “Confirming only. Do not duplicate order.” Provide the vendor name, address, and date the order was placed.

Initiator: Enter the name and NetID of the individual initiating the request for each line item (only required if multiple initiators).

Amount: The total dollar amount for the quantity ordered will calculate.

Notes/Special Instructions: Provide additional specific information to the buyer regarding the purchase as necessary. Include any split distribution instructions in this section, if you wish to charge more than one PTAE0 for the purchase.

Signatures & Authorizations: (Obtain the signatures below)

Preparer Name: Enter the person’s name completing the form.

Authorizer Name: Have the requisition approved by an authorized departmental business manager or administrator.

Secondary Authorization: Requisitions over $100,000 must be authorized by the department Chair, Dean or Major Dept. Head and Director of Sponsored Programs, Grants & Contracts Financial Administration for transactions charged to a sponsored project.

Procurement Authorization: Purchase orders with an aggregate value up to $250,000 must be approved by a Purchasing Director or designee. All purchase orders with a value greater than $250,000 must be approved by the Chief Procurement Officer or designee.

Submit the Form

Send original requisition and supporting documentation to the attention of the appropriate buyer at:

- Purchasing Department
  155 Whitney Avenue.
  Phone: 203 432-9955, Fax: 203 432-9966
- For a complete list of authorized buying agents and their assigned commodities, go to: www.yale.edu/purchase.

Retain a copy of the requisition for departmental records.

Questions? Contact christopher.mihok@yale.edu