

1. Completing the PDF Requisition Form

Step-by-Step Guide

1.1 Download the Form

Ensure you have the latest version of the requisition form (*Rev. 06/24*). The form is available on the university's procurement website or can be obtained directly from the Procurement Office.

1.2 Fill Out the Required Fields

- **Date:** Enter the date the requisition is being completed.
- **Vendor Information:** Include the vendor's name, address, city, state, zip, quoter/contact person, email, phone, and fax.
- **Item Details:** For each item being requested, fill in the quantity, description/part number, unit price, and unit extension. If additional lines are needed, use page two of the form.
- **Subtotals and Totals:** Calculate the subtotal for each page, apply the sales tax rate (LA County 9.5%), and add any shipping/handling fees to determine the total cost.

1.3 Accounting Information

- **CFS:** Fill in the appropriate account, fund, department ID, program, class, and project (if applicable).
- **Approval:** Ensure the form is signed by the requested person and approved by the department head or authorized signatory. If the requisition is over \$1,000 for IT services or software, or over \$5,000 for computer hardware, it must also be reviewed and approved by the I&IT Division designee.
- **ATI Review:** If the requisition involves E&IT products or services, it must be reviewed by the ATI Coordinator.
- **Hospitality Items:** If purchasing hospitality items with state funds, ensure VP or designee approval is obtained.

1.4 Property and Compliance Checks

- Property Review: The procurement department will review for property compliance.
- CFS Review: The procurement department will review for CFS compliance.
- COI Required: Indicate if a Conflict of Interest (COI) review is required.

1.5 Additional Documentation

- Quotations/Proposals: Attach a valid quotation or proposal (dated within 30 days) for service orders. Ensure quantities and pricing match the requisition.
- Waivers: If using off-campus vendors, include a copy of the waiver showing approval from CPP Foundation and GCS.

2. Submission to Smartsheet

Instructions

2.1 Complete the Requisition Form

- Ensure all necessary fields and signatures are completed on the PDF form. Double-check for accuracy and completeness.

2.2 Save the Form

- Save the completed PDF form with a clear and identifiable name, preferably using the requisition number or vendor name for easy reference.

2.3 Submit the Form [\(Procurement Service Request Form - Fiscal Year 25/26\)](#)

- Link for Submission: Access the Smartsheet form using the provided link:

<https://app.smartsheet.com/b/form/55ac9b05706f429caa2e8bd69c2ef8a8>

Upload the PDF: Click on the link and follow the instructions to upload your completed PDF

requisition form. Ensure that the form is correctly uploaded and that any required additional documentation is attached.

2.4 Confirmation

- After submission, you should receive a confirmation email indicating that your requisition has been received. Keep this confirmation for your records.

2.5 Email Submission (Optional)

If you encounter any issues with the Smartsheet submission, you can email the requisition form to procurement@cpp.edu as a backup.

3. Important Notes

- **3.1 Internal Use Only:** Requisitions should not be submitted directly to vendors. They are internal documents used within the university to process and issue a purchase order.
- **3.2 Presidential Orders:** Always use campus resources first for state or foundation business. If off-campus vendors are used, ensure proper waivers are obtained and attached.
- **3.3 Failure to Comply:** Requisitions lacking proper signatures or documentation will be returned for correction.