

CSFPF Purchase Requisition Guide

The article covers how authorized requestors can create a new purchase requisition with their Foundation accounts. To determine which expenses are payable via a requisition, refer to the CSFPF Purchasing Matrix.



If you are making changes to an approved purchase order, refer to the [Change Order Guide](#).

1. Click on the CSFPF ServiceNow Requisition Request located on the CSFPF website.

2. Complete the Requisition Request by ensuring the following information is provided:

REQUEST TYPES AND DETAILS

The requestor information should automatically populate based on your login information.

Click on **New** request type for new requisitions. Check the following optional boxes if your requisition:

- Requires a deposit. A deposit amount is required once checked

Request type and details

* Request type

☐ Change

☒ New

☐ Deposit required

VENDOR INFORMATION

Provide the following vendor information below (required):

- Vendor/Payee Name
- Mailing Address
- Vendor Email

Vendor Information

* Vendor/Payee name

Create a Party Rental

* Vendor email

sales@createaparty.com



* Mailing address

Create A Party Rentals
428 Berry Way
Brea, CA 92821

☐ Payee is an employee of the CSU system or its auxiliaries.

GOODS OR SERVICES

Click **Add** to add a new requisition line for this purchase.

* Goods and Services

<div><div>Add</div><div>Remove All</div></div>					
Actions	Invoice number	Description/Justification	Account number	Object Code (CSFPF use)	Amount
No data to display					

Complete each requisition line (description/justification, account number, and amount) and save. If additional lines are needed, click the add button again to input additional information.

Edit Row

✕

Invoice number

* Description/Justification

Rentals for VIP reception at the Visual Arts New Gallery Open House

* Account number

12345

Object Code (CSFPF use)

* Amount

2000.00

Cancel

Save

Ensure that the **total** amount of all line items match your quote. The total amount should include the cost of goods/services and and other applicable fees (sales tax, delivery, etc.)



Please see the additional requirements for when your expenses exceed a certain threshold.

▼ Requirements

- Purchases of goods or services with a total value less than \$50,000 require at least one quote or an estimated price.
- Purchases of goods or services with a total value equal to or greater than \$50,000 but equal to or less than \$100,000 will require three or more information quotes from different vendors in writing. You will be prompted to upload a single PDF file of the additional quotes.
- Purchases of goods or services greater than \$100,000 will require a Formal Bid (Request for Proposal: RFP) through CSUF's Contracts & Procurement Department. Contact CSFPF for further instructions.
- Purchases of Information Technology (such as computers and software subscriptions) totaling greater than \$50,000 but equal to or less than \$500,000, three or more written quotes from different vendors are required. You will be prompted to upload a single PDF file of the additional quotes.
- Purchases of goods or services from a sole source/brand require CSUF Contracts & Procurement Authorization and approved written justification.

For additional comments, include them in the ***Special Instructions*** field (ex: including additional contacts in email communications).

COMPLIANCE REVIEW

Answer the compliance review questions. Depending on your answer, you may be required to upload additional documents (IT approval, D11 approval, or vendor insurance)

- **IT Purchases:** All IT-related purchases must include an IT Authorization Number, which must be obtained in advance and submitted with the request.
- **Hospitality Expenses:** For expenses subject to CSUF Directive 11, a completed Hospitality Justification Form (D-11) is required.
- **On-Campus Approved Vendor:** If the vendor will be on campus and is an approved CSUF vendor, the most recent Approved Caterers List from e-Business should be attached.
- **On-Campus Not approved Vendor:** If a vendor is scheduled to be on campus and is not included on the approved CSUF vendor list, a valid Certificate of Insurance must be submitted. The coverage must comply with CSU insurance requirements and standards.

3. Upload supporting documentation, which may include but is not limited to valid quote, unsigned contract/agreement, and any other documentation

Attach documents in a single PDF file, which may include but are not limited to valid quote, unsigned contract/agreement and any other supporting documentation. Refer to requisition checklist on CSFPF website.

4. Select the appropriate approver of the account being charged.



Not sure who the appropriate approver signer is? You can view a list of signers with our [Acct Info Foundation Report](#). Add your CSFPF account number in the **GL Key/Project** field and submit for a report of account signers. The requestor cannot also be the approver.

Purchase requisitions exceeding \$3,000 will require a second approver.

5. Read and check the attestation box prior to clicking on the submit button.

Next Steps

Once the requisition request has been submitted, the requester will receive a confirmation email referencing a unique RITM number. A separate email will be sent to the authorized approver requesting their approval.

CSFPF generally requires a minimum lead-time of 15 business days to process a complete Requisition Request. However, contracts for large amounts or requiring additional approvals from other campus units (i.e., IT, C&P, etc.) may require up to 25 business days for review and approval.

Received a requisition approval from CSFPF? Refer to the [Purchase Order Payment Guide](#).

Need Help?

Additional information regarding the procurement process, please reference the CSFPF Procurement Policy on the Philanthropic Foundation website:

<http://foundation.fullerton.edu/policies-forms/>

If you have any questions, please contact the Foundation at CSFPFAP@fullerton.edu or 657-278-2786