

PO#

PR#

Woods Hole Oceanographic Institution

Purchase Requisition

(Refer to the Procurement Home Page for Additional Information (www.whoi.edu/procure))**Supplier Information** (Optional)

Company Name		
Contact		
Address		
City	State	Zip
Phone	Fax	

Today's Date		Required Date
Requester	Phone	Date
Approved By	Phone	Date
Additional Approval	Phone	Date

Controller's Office approval is required for all Capital Asset Purchases. Please note Cost Center to depreciate to in the Notes section below.

Ship To (Provide as much information as possible—if split ship, please specify other address in the Notes section below.)

Name		
Building	Room #	Dept. #
Other		

Check Appropriate Statement

- ☐ Purchase Request already faxed to Procurement, to the attention of _____
- ☐ Cruise sensitive material. Date of cruise _____
- ☐ Confirming Order
- ☐ Hazardous/Radioactive Material
- ☐ Consulted "Property" web site for idle equipment. www.whoi.edu/property

If additional space is required for line items, please provide a separate sheet with the required information.

Project/Cost Center	Object Code	Part Number & Description	Qty	U/M	Price	Total	
-----	-						
-----	-						
-----	-						
-----	-						
-----	-						
-----	-						
-----	-						
-----	-						
Subtotal							
Notes						Freight	
						TOTAL	

Critical Elements of Requisition

- Vendor or Best Source
- Today's Date - Date Requisition Is Completed By the Requisitioner
- Name and Extension of Requisitioner
- Appropriate Authorized Signature
- Additional Signatures
 - Capital Equipment (Controller's Office)
 - Radioactive Materials (Safety Office)
 - Vessel Charters (Port Office)

Critical Elements of Requisition (Cont.)

- Required Date
 - Don't Use ASAP
 - Drop Dead Date (When Is It Needed)
- If Faxed to a Specific Buyer
- Cruise Sensitive Material, Date Of Cruise
- Confirming Order: Please Add "Order Placed With Vendor, Do Not Duplicate" To Notes or In Body Of Order

Critical Elements of Requisition (Cont.)

- Consulted Property For Idle Equipment (Check Box)
- Accounting Information
 - Project/cost Center
 - Object Code
- Description of Products to Be Purchased
 - Model Numbers/ Part Numbers
 - Text Description
 - Other Pertinent Information (I.E. Left Flow or Right Flow Valve)

Critical Elements of Requisition (Cont.)

Ship To Information

- Requisitioner and Location At WHOI
 - Building
 - Room Number
- Off Site Delivery, Non WHOI Receivables
 - Attention To
 - Street Address
 - City/town and Zip Code

Critical Elements of Requisition - Attachments

- Requisitions for Services From a Supplier Not Incorporated (Independent Contractor)

whoiee.edu/administration/procure/dept/purchasing/indcon1/index

- Classification Checklist A (Completed by Requisitioner)
- Classification Checklist B (Completed by Supplier)
- Short Contract Form, Up To \$2,500 (If Not Supplied by Supplier)
- Long Contract Form, \$2,500, Or More (If Not Supplied by Supplier)

Critical Elements of Requisition Attachments (Cont)

- Conflict Of Interest Statement
 - Must Be Included For All Purchases When:
 - Requisitioner Has Conflict
 - Requisitioner Is Working for Someone With a COI
 - Explanation of How Item Was Selected and Why COI Vendor Must Be Used

Critical Elements of Requisition Attachments

- Statement of Competition (Bidding)
 - Under \$10,000
 - Encouraged but Not Needed
 - Bidding or Single/sole Source Justification Encouraged
 - Telephone Solicitations Encouraged
 - \$10,000 and Up
 - Written Bids or Single/Sole Source Justification Required
 - Procurement Reps Will Be Happy To Assist You