

Procedures for Purchase Requisition and Direct Charge Forms

Purchase Requisition:

A **Purchase Requisition** form should be used for materials and equipment purchases and also when contracting a private firm for services. **Special Note:** In the case of a contract with a private firm, when the Purchasing Office receives the Purchase Requisition, a contract will be sent to the individual submitting the Purchase Requisition for review and completion. See Business Office to obtain required forms.

To process the **Purchase Requisition**:

1. The Principal Investigator/Project Director should refer to the fully executed contract, any approved budget revisions, and project expenditure records to determine availability of funds.
2. Before funds can be requested, a line item in the budget must exist relating to the requested purchase. This line item must contain sufficient funds for the purchase.
3. The PI, if a faculty member, should submit the Purchase Requisition to the Department Head for approval. Following the Department Head's approval, the Academic Dean must also approve it. This procedure is not the case for a PI who is part of a Center that reports directly to the Vice President for Research and Graduate Studies. Such PI should submit the Purchase Requisition for approval to the Director of the Center who should send it to the Vice President for Research and Graduate Studies for approval. The nature of the Purchase Requisition will determine the routing process after that.
 - The route for computer equipment and software requisitions is as follows: ORSP, Vice President for Information Technology, President, and Business Office.
 - All other purchase requests are routed from the Academic Dean (or Vice President for Research and Graduate Studies) to the Business Office.

Direct Charge:

1. The PI should refer to the fully executed contract and any approved budget revisions to determine availability of funds.
2. The PI should fully complete the Direct Charge form and secure the signature of the appropriate Department Head.
3. If the funds are from a restricted account, the PI should route the Direct Charge to Melanie Comeaux in the Business Services office.
4. If the funds are not from a restricted account, the PI should route the Direct Charge to Assistant Vice President for Financial Services Ronald Lajaunie.