CALIFORNIA STATE UNIVERSITY SAN BERNARDINO

Procurement Services

REQUISITION CHECKLIST

HOW TO CORRECTLY
ENTER YOUR REQUISITIONS

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1.0 PROCUREMENT FORMS

REQUISITION LIMITATIONS	DOCUMENT / APPROVAL REQUIRED
All visual identity guidelines must be met for your final artwork to be approved by the Office of Strategic Communication.	Strategic Communication Approval
Activities that promote the university to the public and the provision of hospitality in connection with official university business.	Hospitality Form Copy of Agenda List of Attendees and their affiliations
Campus Dining Services (Yotie Eats) has exclusive rights to provide food and beverage at campus events. The use of an off-campus source for provision of food and beverage requires written approvals from Campus Dining Services and EHS (Environmental Health and Safety)	Yotie Eats Approval
NO food events will be approved without the EHS food event notification form.	Approval from EHS
CSUSB is required to review campus Information & Communication Technology (ICT) purchases for accessibility and data security.	ICT Accessibility & Security Review Online Form **Note: items on the Pre-Approved Technology Purchases List do **not** require completion of this form.
Required whenever an order is placed without prior authorization from the Purchasing Office.	Unauthorized Purchase Explanation/Certification (UPEC)
Supplier is an independent contractor	Independent Contractor Request Form

*Effective April 1st, 2019, Procurement moved to a method of receiving documents that support a requisition as an upload to the PeopleSoft requisition. This is a list of the most commonly required supporting documents. Many of you upload your documents already but this is a friendly reminder if a supporting document is missing the requisition will be opened and you will receive an email requesting a document upload. This method is meant to streamline the purchase requisition process, reduce the use of paper, and create electronic storage of the documents with the requisition/purchase order.
**This list is not all inclusive. Additional approvals and or forms may be required. **

2.0 REQUISITIONER CHECKLISTS BY CATEGORY

SUBMIT A REQUISITION BY FOLLOWING THE STEPS BELOW, BASED ON THE CATEGORY OF PRODUCT/SERVICE.

2.1 ADVERTISEMENTS

2.1.1

BILLBOARDS	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Obtain Strategic Communication approval
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**:
	i. Panel number
	ii. Tab number
	iii. Location number
	iv. Size
	v. Dates running
	• **CATEGORY CODE**: **91571** - Advertising newspaper and public
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	4. Get requisition approved by your approving official in CFS

2.1.2

PRINT OR DIGITAL	
✓	**Direction:**
	1. Obtain quote & copy of advertisement from supplier with their email address contact
	2. Obtain Strategic Communication approval
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**:
	i. Product description (full page, half page, etc.)
	ii. Advertisement run dates
	• **CATEGORY CODE**: **91571** - Advertising newspaper and public
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	4. Get requisition approved by your approving official in CFS

2.2 EVENTS

2.2.1

✓	**BANQUETS (OFF CAMPUS)** CSUSB Hospitality Policy
	Direction:
	1. Obtain the Banquet Event Order/quote from supplier with their email address contact
	2. Complete HOSPITALITY FORM
	3. Obtain meeting agenda/flier
	4. Obtain list of attendees and their affiliations
	5. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of event
	• **CATEGORY CODE**: **96115** – Concessions, catering services
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	6. Get requisition approved by your approving official in CFS

2.2.2

✓	**CATERING/FOOD TRUCKS (ON CAMPUS)** CSUSB Hospitality Policy
	Direction:
	1. Request quote from supplier with their email address contact
	2. Email approval from Yotie Eats
	3. Approval from Environmental Health and Safety
	4. Complete Stateside Hospitality Form or Aux Hospitality Expense Request
	5. Agenda/flyer
	6. Insurance requirements per Risk Management
	7. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of event
	• **CATEGORY CODE**: **96115** – Concessions, catering services
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	8. Get requisition approved by your approving official in CFS

✓	**EVENTS (ON CAMPUS)** CSUSB Hospitality Policy (i.e. carnivals, social events, etc.)
	Direction:
	1. Request quote from supplier with their email address contact
	2. Email approval Special Events (i.e. EHS, Risk Management, Police Department, etc.)
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of event
	• **CATEGORY CODE**: **98100** – Rental Equip. Gen.
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	4. Get requisition approved by your approving official in CFS

2.3 FURNITURE

2.3.1

FURNITURE (MODULAR & FREESTANDING)	
✓	**Direction:**
	1. Obtain the following documents from supplier
	• Supplier quote with email address contact
	• Drawing layout from supplier
	2. Obtain facilities planning approval of ADA Compliance
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Part number / Description / Descriptors (color selections)
	• **CATEGORY CODE**: (choose one based on item being purchased)
	I. **42500** – Furniture, office
	II. **4500** – Hardware, misc. (brackets & lock plugs)
	III. **93145** – Furniture install/reconfiguration services
	IV. **96248** – Interior design services
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	4. Get requisition approved by your approving official in CFS

2.4 GOODS

2.4.1

COMPUTER HARDWARE [Pre-Approved Technology Purchases list](#)	
✓	**Direction:**
	1. Contact IT consultant for computer hardware needs request and assistance with obtaining quote
	2. Complete [ICT ACCESSIBILITY & SECURITY REVIEW ONLINE FORM](#) (if applicable)
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**:
	i. (##) – signifies to receiving that item needs to be tagged ($500+)
	ii. Part number (if applicable)
	iii. Type of computer (i.e., OptiPlex 7470 AIO)
	iv. Processor (i.e., Intel Core i7-9700 (8 Cores/12MB/8T/3.0-4.47GHz/65W))
	v. What's included – monitor, screen, mouse keyboard, speakers
	• **CATEGORY CODE**: (choose one based on item being purchased)
	i. **20400** – Computer, micro & peripherals
	ii. **20460** - Monitors
	iii. **20700** – Computer accessories/supplies
	iv. **95300** – Warranty (i.e., Apple Care, Geek Squad Protection)
	v. **92600** – Environmental/ecological services (environmental hazard fee)
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition, including quote.
	4. Get requisition approved by your approving official in CFS

2.4.2

LAB EQUIPMENT AND CHEMICALS [CSUSB Hospitality Policy](#)	

✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Product description from quote
	• **CATEGORY CODE**: **57847** - Hazardous material NOC
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	3. Get requisition approved by your approving official in CFS

2.4.3

PROMOTIONAL GOODS CSUSB Hospitality Policy	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Obtain Strategic Communication approval
	3. Obtain the answers to the following questions to include in the **Header Comments**:
	• What is the purpose of the requested items? (Promotional, award, gift, etc.)
	• To whom, in general, will the items be distributed? (Students, staff, etc.)
	• At what event or type of events will the items be distributed?
	• What is the benefit to the university to be realized with the item distribution?
	4. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Product description from quote
	• **CATEGORY CODE**: (choose one based on item being purchased)
	i. **03778** – Promotional items
	ii. **03700** – Entertainment, misc. (staff use)
	iii. **96600** – Printing & related services (printing set up)
	iv. **96684** – Silk screen printing
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition
	5. Get requisition approved by your approving official in CFS

2.4.4

SPORTS APPAREL (TEAM UNIFORMS, ETC.) CSUSB Hospitality Policy	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Obtain Strategic Communication approval (if CSUSB logo is being used)
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Product description from quote
	• **CATEGORY CODE**: **20000** – Clothing/athletic/uniforms
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	4. Get requisition approved by your approving official in CFS

2.4.5

SPORTS EQUIPMENT	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact

	2. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Product description from quote
	• **CATEGORY CODE**: **80500** – Sporting goods/athletic equipment
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	3. Get requisition approved by your approving official in CFS

2.5 SERVICES

2.5.1

INDEPENDENT CONTRACTOR / SERVICES	
✓	**Direction:**
	1. Obtain quote from supplier with the following information included:
	• Supplier's contact information (email, address, phone number, name of main contact, etc.)
	• Quote number
	• Date of quote
	• Expiration date of quote or how long the quote is valid
	• Clear description of what is covered by the quote
	• Location where work will be carried out
	• Date(s) & Time(s) of services
	• Cost breakdown (including labor, materials, or special costs)
	• Unit Pricing, unit of measure
	• Total cost
	• Payment terms and payment methods
	2. Validated **INDEPENDENT CONTRACTOR REQUEST**
	3. **INSURANCE AND/OR INSURANCE WAIVERS ADVISED BY RISK MANAGEMENT**
	4. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of event
	• **CATEGORY CODE**: (choose one based on item being purchased)
	i. **96161** - Public Speaking
	ii. **92400** – Educational Services
	iii. **96546** – Graphic Design
	iv. **96200** – Misc. Services
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition
	5. Get requisition approved by your approving official in CFS.

2.5.2

PRINTING SERVICES	
✓	**Direction:**
	1. CSUSB Printing Services 1st right of refusal
	2. Obtain quote from supplier with the following information included:

	• Supplier email contact
	• Scope of work
	• Cost of services
	3. Strategic Communication approval
	4. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Service/product description from quote
	• **CATEGORY**: **96600** – Printing & related services
	5. Get requisition approved by your approving official in CFS.

2.5.3

SOFTWARE	
✓	**Direction:**
	1. Obtain quote from supplier with the following information included:
	• Supplier email contact
	• Description of software
	• Cost of services
	• Term (dates) of use
	• Agreement that includes terms of usage
	2. Information and Communication Technology Accessibility & Security Approval
	3. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Description of software being purchased and term of use
	• **UOM:** Number of licenses
	• **CATEGORY**: **20800** – Computer Software, micro
	4. Get requisition approved by your approving official in CFS.

2.5.4

SPONSORSHIPS	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of sponsorship
	• **CATEGORY CODE**: **96200** – Misc. service
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	3. Get requisition approved by your approving official in CFS

2.6 TRAVEL

2.6.1

DOMESTIC FIELD TRIP	
✓	**Direction:**
	1. Obtain agreement from supplier with their email address contact

	2. Submit Concur travel request for employees and obtain travel ID
	3. Obtain List of attendees (Minors and staff members identified)
	4. Notify Risk Management (Attach email correspondence)
	5. Enter requisition in CFS – note requisition number
	• **LINE DESCRIPTION**: Event name
	• **CATEGORY CODE**: **92400** –Education services
	• **HEADER COMMENTS**:
	i. Arrival and departure dates
	ii. Event name, short description and purpose
	iii. Attach all required approval forms and documents to the requisition.
	6. Get requisition approved by your approving official in CFS

Prohibited states ([CSU TRAVEL RESTRICTIONS):](#) Alabama, Kansas, Kentucky, Mississippi, North Carolina, South Dakota, Tennessee, & Texas. For additional [domestic travel restrictions](#). [Risk Management academic field trip guidelines](#) **[Travel Policy (ICSUAM 3601.01)](#)**

2.6.2

HOTEL STAY (RECRUITMENT) [Travel Policy (ICSUAM 3601.01)](#) ***2 business days** prior to arrival*	
✓	**Direction:**
	1. Make reservation with hotel and obtain confirmation with their email address contact
	2. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**:
	i. Position recruiting
	ii. Guest name
	iii. Arrival and departure dates
	• **PRICE:** Do not separate item lines for taxes, include full amount on one line
	• **CATEGORY CODE: 97100** – Real property rental/lease
	• **HEADER COMMENTS:** Attach all required approval forms and documents to the requisition.
	3. Get requisition approved by your approving official in CFS

2.6.3

HOTEL STAY (STUDENT CONFERENCE) [Travel Policy (ICSUAM 3601.01)](#)	
✓	**Direction:**
	1. Make reservation with hotel and obtain confirmation with their email address contact
	2. Notify UPD & Risk Management
	3. Obtain List of attendees (minors and staff members identified)
	4. Submit Concur travel request for employees and obtain travel ID
	5. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of event
	• **PRICE:** Do not separate item lines for taxes, include full amount on one line
	• **CATEGORY CODE: 97100** – Real property rental/lease
	• **HEADER COMMENTS**:

	i.	Faculty's concur travel ID
	ii.	Event name, short description and purpose
	iii.	Arrival and departure dates
	iv.	Attach all required approval forms and documents to the requisition.
	6. Get requisition approved by your approving official in CFS	

NOTES:
**Prohibited states (CSU TRAVEL RESTRICTIONS): Alabama, Kansas, Kentucky, Mississippi, North Carolina, South Dakota, Tennessee, & Texas. For additional domestic travel restrictions.
Risk Management academic field trip guidelines
**Travel Policy (ICSUAM 3601.01)
Additional expenses (i.e. gas, food etc.) submitted to the department for a travel claim.

2.6.4

INTERNATIONAL/STUDY ABROAD Travel Policy (ICSUAM 3601.01)	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Obtain List of attendees (minors and staff members identified)
	3. Notify UPD & Risk Management
	4. Submit Concur travel request for employees and obtain travel ID
	5. Enter requisition in CFS - note requisition number
	• **LINE DESCRIPTION**: Name of event (i.e., London abroad)
	• **CATEGORY CODE**: **92400** – Education services
	• **HEADER COMMENTS**:
	i. Faculty leader's Concur travel ID
	ii. Arrival and departure dates
	iii. Event name, short description and purpose
	iv. Attach all required approval forms and documents to the requisition.
	6. Get requisition approved by your approving official in CFS
	**Current international travel restrictions
**Travel Policy (ICSUAM 3601.01)

2.7 MOTOR VEHICLES

2.7.1

AUTOMOBILE	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Obtain Facilities Management email approval (attach to requisition)

	3. Enter requisition in CFS – note requisition number
	• **LINE DESCRIPTION**: Product description on quote
	• **CATEGORY**: **07000** – Auto vehicles & equip
	4. Get requisition approved by your approving official in CFS

2.7.2

CART	
✓	**Direction:**
	1. Obtain quote from supplier with their email address contact
	2. Obtain Facilities Management approval (Walter Elliot II) (attach to requisition)
	3. Enter requisition in CFS – note requisition number
	• **LINE DESCRIPTION**: Product description on quote
	• **CATEGORY**: **07000** – Auto vehicles & equip
	4. Get requisition approved by your approving official in CFS

> ** ALL CARTS MUST INCLUDE THE FOLLOWING EQUIPMENT:
> 1. Seat belts for each passenger   5. Headlights
> 2. Tail lights   6. Brake lights
> 3. Turn signals   7. Windshield
> 4. Horn   8. Windshield wiper