



Instructions for Completing a Purchase Request



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# INSTRUCTIONS FOR COMPLETING PURCHASE REQUEST

## 1 General

### 1.1 Definitions

A Purchase Request (PR) is a form to be completed by the end user for goods and services charged to a specific department. This form is available at [www.csbf.nasa.gov/bids.html](http://www.csbf.nasa.gov/bids.html), under CSBF Employee Purchasing Forms.

The Requisitioner is the person that prepares the PR form.

## 2 Process

The information on the PR form must be accurate and complete. Requisitioners should include any and ALL information that will help the Buyer place the order (i.e., faxed quote, internet quote, copy of advertisement, manufacturer name and part numbers, etc.). Leaving out important information will slow down the process.

The Requisitioner routes the form to their immediate supervisor for signature approval. The supervisor is responsible for routing the PR for the next level of signature authorization.

After all signature authorizations are obtained the PR is then routed to Accounting and Property for coding.

Accounts Payable will receive the PR and enter the relevant information in the internal purchasing log including assigning the PR a reference number. The PR is then delivered to the Purchasing Department where it is stamped with the time/date received.

The PR is delegated to a Buyer in the Purchasing Department to complete the order.

## 3 Completing a PR Form

The list below numerically corresponds to the sample PR in this section.

### 3.1 Requisitioner Information

YELLOW area on form: Enter Requisitioner's name and telephone extension number.

### 3.2 Required Date

INDICATE A REALISTIC DATE THE ORDER IS REQUIRED.

Please DO NOT USE ASAP.

If this section is left blank, the Property and Purchasing Department will automatically assume that 30 days delivery is fine.

Purchase requests are processed as they are received in Purchasing. True emergency items will be given high priority.

The Requisitioner will be consulted if their required delivery date cannot be met.

### 3.3 Suggested Vendor Information

Enter complete name, address, telephone number, contact name, and email address of suggested source for orders. If you do not have a recommended source then enter "best source."

Attach all copies of correspondence sent to or received from the vendor to the requisition form.

### 3.4 Specific Purpose

Enter specific application ( i.e., maintenance, repair, SIP 11, Ft.Sumner Campaign, replacement parts, etc.)

### 3.5 Department Reference Number

Enter your department internal number, if applicable.

### 3.6 PR Type

Click in field to show the drop down menu. Click on appropriate choice.

### 3.7 Ship To

Click in field to show the drop down menu. Click on appropriate delivery location.

### 3.8 Item Number

Enter sequential numbers for items (ex: 1, 2, 3, etc.).

### 3.9 Quantity

Enter number requirement.

### 3.10 Unit

Click on field and choose by clicking on appropriate choice.

### 3.11 Description

Complete detailed description, vendor catalog, part or SKU number; manufacturer name and part number; size; color; voltage; specifications, etc.

### 3.12 Unit Price

Enter amount from catalog, vendor's website, email quote, etc.

### 3.13 Line Price

This amount will automatically populate in field. No action required.

### 3.14 Comments

Enter additional information or remarks about the delivery, special shipping instructions, specific campaign, or other information relative to the procurement, i.e., ship to address, if other than CSBF Palestine.

### 3.15 Signature Block

Requisitioner must obtain appropriate signature approvals. **Purchasing is not responsible for obtaining signatures.**

## 4 Approval Matrix for Purchase Requisitions

**Table 1 Approval Matrix**

<b>NAME</b>	<b>TITLE</b>	<b>AUTHORITY THRESHOLD</b>
Jay Jordan	Director	> \$100,000 <sup>1</sup>
Stephen B. Hottman	Program Manager, PSL Balloon Program	≤ \$100,000
Danny RJ Ball	CSBF Site Manager	≤ \$20,000
Bill Stepp	CSBF Head, Operations Dept.	≤ \$1,500
Dwayne Orr	CSBF Head, Electronic Systems Dept.	≤ \$1,500

Full name signatures should be used when authorizing PR's.

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<sup>1</sup> Procurements equal to or greater than \$500,000 are coordinated via email to the NMSU Director of Purchasing for his or her coordination of the requirement with the NMSU Vice President for Business and Finance and Board of Regents for NMSU

## 5 Sole Source Procurement

The Requisitioner is responsible for completing and signing the sole source form and attaching it to the PR form before sending the PR through signature channels. The Requisitioner should observe the different reasons for sole source procurements as outlined on the form. Check the appropriate box that justifies the procurement. Sole source forms are available at the [www.csbf.nasa.gov/bids.html](http://www.csbf.nasa.gov/bids.html).

Both Federal and State laws permit sole source procurement when it is evident that no competition is available, or if an extreme urgency exists that will be alleviated by a sole source procurement.

Sole source procurement also occurs when a contract designates specific goods or services (Contract Directed), when software is already developed, or when compatibility or repair and maintenance are factors.

Sole source procurement applies to vendors and to products (brand names). When brand names are specific, bids will be solicited from those vendors known to sell the requested item.

The final decision for sole source procurement is the responsibility of the CSBF Purchasing Department. The CSBF Purchasing Staff will place all sole source procurements over \$2500 only after receipt of a properly executed sole source form and an approved PR form. The absence of a completed sole source form with the PR can result in delays with placing the order, since manufacturers or vendors solicited may not be acceptable to the Requisitioner due to technical reasons unknown to the Purchasing Staff.

## 6 Procurement Method

The method of procurement is determined by the dollar value.

**Table 2 Approval Matrix for Dollar Value Limits**

Dollar Value	Procurement Method
\$0.00 to \$250.00	Petty Cash Transaction
\$0.00 to \$2,499.99	One written, oral, internet, or telephone quotation
\$2,500.00 to \$9,999.99	Three written, oral, internet, or telephone quotations
\$10,000.00 to \$19,999.99	Formal Request For Quote to at least three vendors for written quotations
\$20,000.00 and up	Advertised; Formal Invitation For Bid or Request for Proposal sent to at least three vendors for sealed bids or proposals

## 7 Property

Central Reportable Equipment (CRE) is equipment, special test equipment, special tooling, and non-flight space property (including ground support equipment) that is

- (1) generally commercially available and used either as a separate item or as a component of a system.
- (2) having an acquisition cost > \$1,000 or more, and
- (3) identifiable by a manufacturer, model number and serial number.

The CSBF Property Administrator shall screen the equipment (CRE > \$1,000) through NASA Equipment Management Systems (NEMS) to request Contracting Officer (CO), NASA GSFC WFF approval. Refer to the Property Control Procedure manual for further information available through the CSBF Property Administrator.

*NOTE: CO APPROVAL CAN REQUIRE UP TO 30 DAYS. QUESTIONS REGARDING PROPERTY ITEMS SHOULD BE DIRECTED TO THE CSBF PROPERTY ADMINISTRATOR.*

## 8 General Information

- (1) Vendor's verbal responses are not routinely sent to the Requisitioner for technical review and evaluation unless the Buyer cannot find a vendor to meet the exact requirements. However, for purchases requiring an RFQ, IFB or RFP the Requisitioner is asked to review the responses and indicate in writing whether or not each submitted quote is technically acceptable.
- (2) When a vendor cannot provide a price for an item without changing specifications, the Buyer will discuss these changes with the Requisitioner, prior to the award of any purchase order.
- (3) Competition is not required on purchase requests under \$2,500. However, the Buyer must consider the price from the suggested source to be reasonable. If there is any doubt as to the reasonableness of the price, the Buyer is required to solicit competition.
- (4) Requisitioners having technical discussions with vendors shall make it clear that no order is being placed, nor does the vendor have any authorization to proceed with ordering goods, or to undertake any work, or provide any services, until they are authorized to do so by the CSBF Purchasing Staff.

Requisitioners should avoid discussing pricing with vendors except in very general terms. Also, Requisitioners should not comment to vendors about a "cover" purchase order to follow that will confirm the discussion.

Purchases made without proper approval may become the personal obligation of the person originating such a purchase. (NMSU Purchasing Policy).

- (5) Requisitioners contacting vendors about free material samples or bulky catalogs should advise the CSBF Purchasing Staff or CSBF Shipping & Receiving. If the Requisitioner is receiving "FREE SAMPLE" or "FREE CATALOG" instruct vendor to ship to Requisitioner's attention.
- (6) Requisitioners shall advise the CSBF Purchasing Staff on any modifications, repair, software, etc., or exchange of items under warranty involving returning

to manufacturer. These must be handled on either a Shipping Memo or Shipment Discrepancy form.

In these instances, vendors will sometimes charge, i.e., invoice for the new item and then upon receipt of the old item will issue a credit against the invoice. This creates confusion and extra work when no one knows about these transactions except the Requisitioner. These items are often shipped to the CSBF without mention of the Requisitioner's name and without paperwork to cover. The items could be delayed in reaching the Requisitioner or be given to the wrong person.

- (7) A detailed account of CSBF Purchasing Policies and Procedures can be reviewed by any Requisitioner by contacting the Purchasing Administrator or Buyer.

END