

## Backup Documentation & Requisition Checklist

For all purchases of \$5,000 or more (and payments made to individuals, regardless of amount), departments must submit a requisition in Banner Admin to initiate the generation of a purchase order. After a requisition has been completed and approved, the Procurement Services office checks it for accuracy and makes sure that all required documentation has been submitted to ensure that the subsequent purchase order is issued in compliance with all University policies. Before you submit your requisition, use this checklist to make sure you have all of the required documentation and information in order to expedite the processing.

### BACKUP DOCUMENTATION REQUIREMENTS

All backup documentation must be submitted to Procurement Services by intercampus mail (2015 JHZ), fax (616-331-3287) or email ([purchasing@gvsu.edu](mailto:purchasing@gvsu.edu))

- A contract, agreement or quote to support the purchase
  - Contract, agreement or quote is signed by all parties
  - Contract, agreement or quote details the payment terms (invoicing, down payment, etc.)
- If installation is required for the purchase, documented (email) approval from the appropriate department is required
  - Allendale: Contact Facilities Planning [studentf@gvsu.edu](mailto:studentf@gvsu.edu)
  - Grand Rapids and Regional Campuses: Contact Facilities Services GR [dcoper@gvsu.edu](mailto:dcoper@gvsu.edu)
- Purchases of IT software and/or equipment require documented (email) approval from Information Technology Technology Supply Office: [techsupply@gvsu.edu](mailto:techsupply@gvsu.edu) | [Technology Supply Policy](#)
- Maintenance or support that is required for purchases of equipment and/or software must have an agreement
  - Maintenance/Support agreement must be signed by all parties
  - Maintenance/Support agreement must have date(s) of service
- If you are working with a person performing a service, the correct documentation is required depending on the nature of the service(s) – see below
  - Speaking engagements/presentations: [Honorarium Form](#)
  - All other services: [Independent Contractor Agreement \(RO\)](#) if individual will be invoicing [Independent Contractor Agreement \(CW\)](#) if a lump sum payment is required (no invoicing).  
**Note: the 20 Questions Form on pages 2-3 is also required per IRS regulations.**
- If the vendor or individual you are working with is new or there have been no transactions in 3 years or more, a [W9](#) is required to collect EIN and SSN information
  - International Companies:** a [W-8BEN-E](#) form is required instead of a W9
  - International Individuals:** a [W-8BEN](#) form is required instead of a W9
    - A [Foreign National Information Form](#) must be completed by the international individual and sent to Luanne Brown [brownlua@gvsu.edu](mailto:brownlua@gvsu.edu)
- Competitive Sourcing Requirements – See [Bid Thresholds](#) or [contact your Buyer](#) for assistance
  - Sole Source Justification if no bids were solicited
  - Bid documents if bids were solicited

## BANNER REQUISITION REQUIREMENTS

Please include all information below on your requisition in Banner. Dates and details can be added using the [Item and/or Document Text](#) options.

- Contract start and end dates (if applicable)
  - Dates must be in the format of a start and end date (ex: July 1, 2018 – June 30, 2019) NOT in a month count format (ex: 12 months)
- Include preferred method of PO or check delivery (if applicable)
  - If you would like the PO emailed to the vendor, include the email address
  - If you would like the PO mailed to a different address, include the new address
  - If you would like to hand the check to a speaker/performer after the event, please indicate which method you prefer for check pickup/delivery prior to your event.
    - Call or Email** for check pickup: Indicate the date the check is needed as well as the name and extension or email address of the person to contact
    - Intercampus Mail:** Include the date the check is needed and the name, building abbreviation and room number of the delivery address
- Make sure you are using the correct FOAP on your requisition
  - If the contract crosses fiscal years: use account code 7389
  - If you are purchasing fixed assets/taggable equipment, use the correct account code. Contact your Accountant for assistance in determining if the equipment you are purchasing should be capitalized
    - 7602: Equipment > \$5,000
    - 7603: Computer Equipment > \$5,000
    - 7604: Computer Software > \$5,000
    - 7605: Furniture > \$5,000
    - 7606: Office Equipment > \$5,000
  - If you are leasing property/space or vehicles
    - 7027: Lease/Rental Payment
    - 7532: Leased Vehicle
  - If you are using grant funds for your purchase, make sure you are using the correct FOP and account code for the purchase – contact your Grants Accountant for assistance
- If you are trading in any equipment, include the make, model, trade-in value and asset tag number on the requisition and send the asset tag via intercampus mail to Procurement Services 2015 JHZ. [Disposal Policy](#)

## CONTACT INFORMATION

If you have any questions, please contact a member of the Procurement Services department

Procurement Services	<a href="mailto:purchasing@gvsu.edu">purchasing@gvsu.edu</a>	616-331-2280
Valerie Rhodes-Sorrelle	<a href="mailto:rhodesv@gvsu.edu">rhodesv@gvsu.edu</a>	616-331-2283
Kip Smalligan	<a href="mailto:smalligk@gvsu.edu">smalligk@gvsu.edu</a>	616-331-3211
Aaron Caccamo	<a href="mailto:caccamo@gvsu.edu">caccamo@gvsu.edu</a>	616-331-3436
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