Requisition Check List

1. New Supplier or Correction/Update to an existing Supplier
   a. Requisition needs to be processed with New Supplier as supplier
   b. Is the WSU W9, OPERS form etc. completed and attached?
      i. Any document containing sensitive information such as SSN, should be in internal notes (A/P will need this copy). If the supplier requires a copy of the document, then redact the information before attaching in external notes.

2. Quote
   a. Is the quote still valid or has it expired?
      i. The quote should be attached in external notes.
   b. Are there terms and conditions on the quote?
      i. If so, forward to Lindsay Ramge through the WrightBuy system.
   c. Does the quote require a signature?
      i. If so, forward to Lindsay Ramge through the WrightBuy system.
   d. Does the price on the quote match the requisition?
   e. Does the requisition product description accurately describe what is being purchased?
   f. Is the commodity code correct?

3. Contract
   a. Does the requisition have or require a contract?
      i. Is the contract complete and accurate?
      ii. Check the signature blocks on the contract and if either the vendor and/or Lindsay Ramge’s signature does not appear, forward to Lindsay Ramge through the WrightBuy system.
      iii. Please be aware that it may take 2-3 weeks for Lindsay Ramge to complete the contract process.
         1. Contracts are to be completed/approved prior to services being rendered.
   b. Any document containing sensitive information such as SSN, should be in internal notes. If the supplier requires a copy the document, then redact the information before attaching in external notes.

4. Certificate of Insurance (COI)
   a. Does the requisition require a COI (is the supplier coming onto campus)?
   b. If the supplier has signed WSU contract (except for the MOA), a COI is not required.
5. Distribution of Purchase Order
   a. If the PO does not need to go to the supplier (Sam's Club, referees, memberships, subscriptions etc.) or the requisition is travel related (reimbursement), please change the distribution on the requisition and input your email address.
      i. Please review the Customize Order Distribution document on Purchasing’s webpage under WrightBuy Information. Here is the link directly to that page: http://www.wright.edu/business-and-finance/campus-auxiliary-and-business-services/strategic-procurement/wrightbuy
   ii. For all requisitions, the invoice is required to be sent to A/P for payment. Attaching the invoice to the requisition, will not get it paid.
      1. Make sure that the invoice contains the PO number and has been signed.
   b. Does the payment need to be sent via wire transfer?
      i. Change the distribution method on the requisition to Bursar fax 937-775-5775.
      1. Attach appropriate documentation in external notes (this information will go to the Bursar's office) and state that it is a Wire Transfer.

6. Communication
   a. If you need to communicate to an approver, use the comment tab and/or internal notes. Remember everything in external notes goes to the supplier.