

# Classified Institute CRC Business Services and DO Fiscal

January 9, 2023



**COSUMNES**  
RIVER COLLEGE

# Requisitions

- CRC Expert

Information needed PRIOR to filling out the Requisition:

1. Understand the nature of the purchase, get approvals by Chair, Dean, IT, etc. and find out where the item(s) will be stored (needed for Location Field on Requisition)
  - a. IT Procurement Levels: 0 = Non-IT; 1 = product; 2 = software [it-expenditure-review-process.pdf \(losrios.edu\)](https://www.losrios.edu/it-expenditure-review-process.pdf)
2. Account String - Confirm that there's funding in the appropriate account. May need to do a Budget Entry.
3. Vendor Information– if the vendor is not registered with LRCCD, send them the “Become a Vendor” link [Become a Vendor | Los Rios Community College District](#).
4. Quote or Screenshot of the Shopping Cart in PDF form to attach to the Comment section of Requisition
  - a. Purchases with a unit cost ranging from \$1,000 and \$4,999 attach 3 informal quotes (websites, emails, etc)
  - b. If one item is over \$5,000 attach 3 formal written quotes
5. Tip – use Convert Case [Convert Case | Convert upper case to lower case, lower case to upper case and more!](#) or Microsoft Word to convert item description into Uppercase to enter into the Description field on Requisition
6. Ensure formal quotes from vendors are using the correct tax rate.
  - If an item will be picked up (not delivered), then it is appropriate to pay the vendors tax rate
  - If an item is being delivered to campus, then the quote must indicate/use CRC's tax rate (8.75%)
  - If a vendor says that tax is included and does not have a line item on the quote, DO will still pay tax (which means your items cost more!)
    - If this is the case, your budget needs to have the additional funds needed to cover the item

# Requisitions

- CRC Expert

5 things to check before sending off

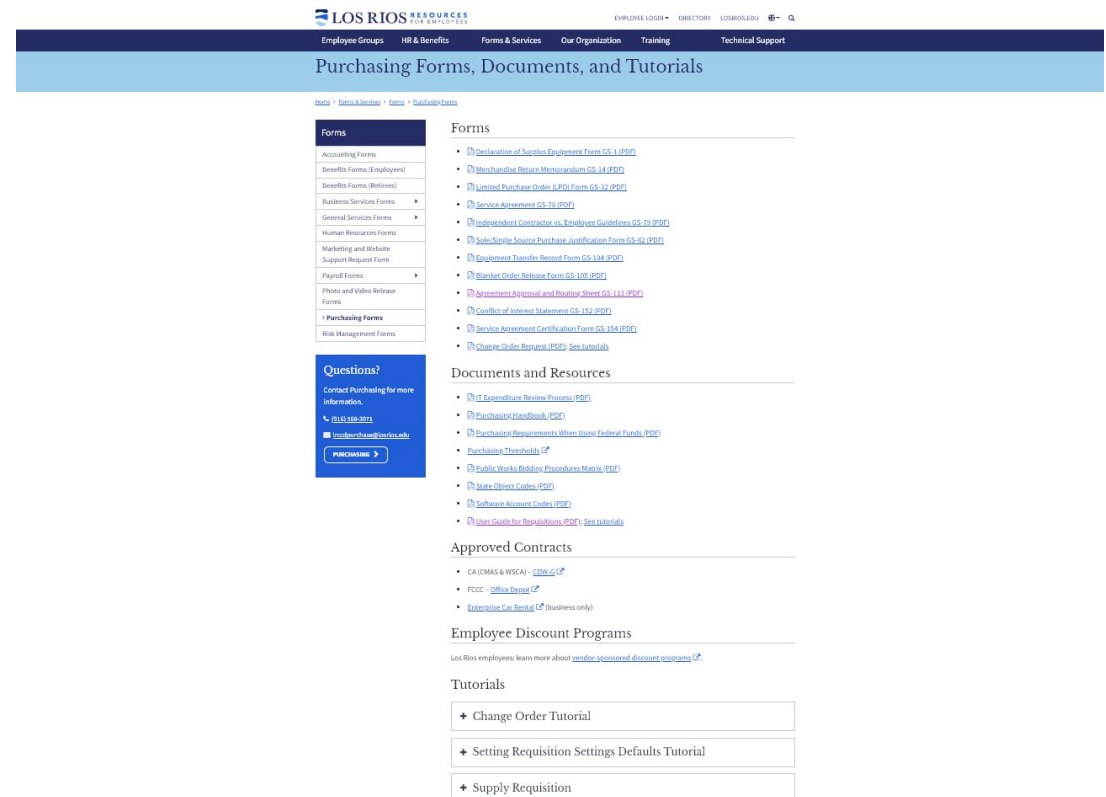
1. Print Requisition to review, and check that the Supplier and address are the same as the quote
2. Budget Status is valid
3. Origin = CRC (can change depending on Requestor's teaching assignments)
4. Categorical Certification attached if categorically funded
5. Quotes and Comments attached

# Requisitions

- DO Expert
  - Most common reasons forms are returned:
    1. Fully-executed contract/agreement/Scope of Work to be attached to requisition
    2. Additional quotes for items over \$1K
    3. Completed Sole Source documents
  - Sign of Expertise
    1. Nothing on Delayed Report, and approved POs distributed to Vendor & Campus.
- IMPORTANT NOTE: Categorical Certifications
  1. Certifies the purchase is in compliance with the requirements of the Categorical Program Grant or Special Project. \*\*more details in the Purchasing Handbook\*\*

# Requisitions

- Purchasing Training – People Soft Online Requisition
- Live web links:
- [District Purchasing Forms](#)
- [Purchasing Handbook](#)
- [User Guide for Requisitions](#)
- [Setting Requisition Settings for Defaults - tutorial](#)
- [Supply Requisition - tutorial](#)



The screenshot displays the 'LOS RIOS RESOURCES FOR EMPLOYEES' website. The main navigation bar includes links for Employee Groups, HR & Benefits, Forms & Services, Our Organization, Training, and Technical Support. The page title is 'Purchasing Forms, Documents, and Tutorials'. The left sidebar contains a 'Forms' menu with categories like Accounting Forms, Benefits Forms (Employees and Retirees), Business Services Forms, General Services Forms, Human Resources Forms, Marketing and Website, Support Request Form, Payroll Forms, Photo and Video Release Forms, Purchasing Forms, and Risk Management Forms. Below this is a 'Questions?' section with contact information for purchasing. The main content area is divided into three sections: 'Forms' (listing various forms like Declaration of Surplus, Merchandise Return, Limited Purchase Order, Service Agreement, Independent Contractor, Solicitor/Source Purchase Justification, Equipment Transfer, Blanket Order Release, Agreement Approval, Conflict of Interest Statement, Service Agreement Certification, and Change Order Request), 'Documents and Resources' (listing documents like Expense Report, Purchasing Handbook, Purchasing Requirements, Purchasing Thresholds, Public Works Bidding Procedures, Quote/Order Codes, Software Account Codes, and User Guide for Requisitions), and 'Approved Contracts' (listing CA (CMAS & WSCA), FCCC, and Enterprise Car Rental). Below these are 'Employee Discount Programs' and 'Tutorials' (Change Order Tutorial, Setting Requisition Settings Defaults Tutorial, and Supply Requisition).

# Questions