Processing Requisitions Quickly

• Choose the Correct Account Allocation:

> YMA = Only One (1) Budget Account will be used

> YDA = More than One (1) Budget Account will be used (think of the "D" in YDA representing "Different")

• Use only Upper Case letters (Press your Caps Lock Key)

• Enter the correct "Batch Number". The Batch Number is the code to direct your requisition to the proper Procurement Specialist. The default will be the date. If you are unsure of the Batch Number or the Procurement Specialist that will process your order, contact Procurement at 469-6202.

• Change the "Due Date" and "Ship Date" blocks to the date the merchandise is needed. The default is the date the requisition is entered.

• Every requisition should end with a narrative line with the Procurement Specialist's contact information. To do this in the Narrative block, enter the "Batch Number/Procurement Specialist's initials and click in the "Description Block" and the information will populate.

• After entering all lines, look at the document. Is the requisition organized? If you have a narrative the vendor must read, put that narrative line first. For example: a different ship to address. Look for misspellings in your document. Put yourself in the vendor's place. Are all the details in the description such as grade level, color, vendor item number? Have you created a line for shipping?

• Be sure to "Submit the requisition For Approval". If you do not press the button to "Submit for Approval", the requisition stays on your desktop and is not seen by the approvers. Also, if you make changes or open the requisition after submitting for approval, you must submit the requisition for approval again. Let your Director or Principal know that you have re-submitted the requisition a second time. Also let your Director or Principal know they can approve a requisition when they are not in the office as Skyward is an Internet based program.

• When entering a requisition for a vendor that has not been set up, be sure to enter all vendor information on the "Notes". Include contact name, contact phone numbers, vendor name, physical and email address. If the new vendor set up is the result of a vendor that will not take a Procurement Card and the vendor will not be used again, we are requesting that you attempt to find a vendor that accepts Procurement Cards.

• Attach quotes and documentation.