CSUSM CSUBUY P2P Requisition Checklist

Requisition Checklist:

- ☐ Funding / Chartfields Verified (Persona)
  - If the total purchase or contract amount may exceed $99,999, please work with Procurement to ensure fair and open competition requirements are met.
- ☐ Supplier Setup or Extended for the CSUSM Business Unit/Persona
- ☐ Supplier selected on the requisition
- ☐ Correct Form Type Selected (Goods and Services, IT Hardware, IT Software, Independent Contractor, Facilities and Construction, Hospitality, Punchout Supplier (Dell, IRG, Amazon, Staples, etc.).
  - If unsure, please contact Procurement.
- ☐ Include estimated date(s) of services in the requisition form
- ☐ Scope of Work or Specifications/Description of products or services to be provided.
  - Note: for Independent Contractor requisitions, include the scope of services template located on the Procurement website.
- ☐ Quote/Estimate *matching* requisition amount
- ☐ All Supporting Documents Attached (information relevant for the purchase), including any documentation provided by the supplier and the contract, if one is in place.
- ☐ Internal Notes Contain the Following (not required for Punchout purchases):
  - CSUSM contact name and email address
  - Supplier contact name and email address
  - Dates of services
  - Relevant information regarding delivery instructions, date(s) needed, and background information to help the assigned Procurement team member process the requisition

Special Purchasing Requirements:

- IT Software
  - Answer IT Software form questions.
  - HECVAT
  - VPAT
  - See https://www.csusm.edu/iits/iitsforyou/itr-process/index.html
- IT Hardware
  - Answer IT Hardware form questions.
  - See https://itservicecatalog.csusm.edu/service.php?id=66
- Independent Contractor
  - Answer Independent Contractor form questions.

    - Note: HR will review the responses to the questions, and they may indicate that a background check is required (see https://www.csusm.edu/procurement/procurementservices/independentcontractor.html for the Background Check Compliance Statement).
    - Instructions for an IC requisition and scope of services are at https://www.csusm.edu/procurement/procurementservices/independentcontractor.html.
- Facilities and Construction Request
    - DIR registered contractor for maintenance or public works projects $1,000 and over.
    - See https://www.csusm.edu/procurement/procurementservices/purchasing/pw_maintenance.html

Resources:

- Berti the Bot: https://www.csusm.edu/bfs/pcbo/archive_notices/berti_p2p_support.pdf
    - Berti's knowledge base is training guides and resources found on the Procurement and Contracts website. Berti is intended to answer general process questions. If you are not receiving helpful responses, try rephrasing your question. For specific requisition or PO questions, please book an appointment or attend office hours.
- P2P information and FAQ's: https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/csubuy_p2p.html
- Tips for Making a Purchase:
    - Goods, Services, IT: https://www.csusm.edu/procurement/procurementservices/purchasing/goods.html
    - Public Works, Maintenance, and Professional Services: https://www.csusm.edu/procurement/procurementservices/purchasing/pw_maintenance.html
    - Independent Contractors: https://www.csusm.edu/procurement/procurementservices/independentcontractor.html
- Vendor Resources: https://www.csusm.edu/procurement/procurementservices/informationforvendors.html
- How To's and Forms: https://www.csusm.edu/procurement/procurementservices/forms.html
- Requisition Roles and Responsibilities: https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/roles_and_responsibilities.html
- Office Hours: Every Thursday from 1:00 pm – 1:45 pm at Zoom
- Appointment Booking: **New! Book a 15-minute Appointment for P2P Help**