

SANILAC COUNTY COMMUNITY MENTAL HEALTH AUTHORITY

ADMINISTRATIVE PROCEDURE

NUMBER: DA1051

NAME: PURCHASE REQUISITIONS

INITIAL APPROVAL DATE:	04/27/1999	APPROVED BY: Audit Committee
(LAST) REVISION DATE:	11/17/2022	APPROVED BY: CFO
(LAST) REVIEW DATE:	12/12/2024	REVIEWED BY: Policy Committee
DISCONTINUED DATE:		REPLACED BY:

I. PURPOSE

II. APPLICATION

Populations: **NONE**
Programs: **Direct - ALL**
Contracted - ALL

III. PROCEDURE

Purchases will be initiated by an approved purchase requisition (electronic Sanilac CMH Database Purchase Requisition (formerly Form #0086)).

A. Requisitions for routine goods and services should contain:

1. Vendor name and address, email address, phone number, and website are also helpful information to include.
2. Date requested – the date requisition was made.
3. Date required – the date that the items are needed.
*Denote “rush” when relevant to alert the purchasing personnel of the need for prompt action.
4. Ship to – specific site or person where goods or services are to be delivered.
5. On arrival notify – name of individual designated to receive goods when received from vendor.
6. Item number – the catalog or part number.
7. Quantity – specific quantity to be purchased.
8. Unit of Measure – unit of measure (box, pkg., doz.) is important and should be entered.
9. Description – description of item or service ordered-picture of specific item if not a regular purchase (please include the purpose of purchase).
10. Unit price – list current unit price.
11. Total cost – unit price times the quantity.
12. Submitted by – signature of individual making the request.
13. Supervisor – signature and date of supervisor approval.
14. Fiscal Approval – signature and date.
15. Department - Must include name of department the items are for.
16. Cost allocation – assign cost allocations if known, otherwise fiscal department will complete.

- B. Attachments to purchase requisition - Must have applicable receipts, CDM, bid, or any other applicable backup attached before submitting for approval.
- C. Completed requisitions are forwarded to the CFO and/or CEO for approval.
 - 1. Review for completeness of information.
 - 2. Determine if funding is adequate for purchase.
 - 3. The requisition must be accompanied by appropriate receipts, bids or CDM, if applicable, according to the Bid Policy.
 - 4. If a requisition is denied, it is returned to the supervisor with a brief explanation.
- D. Completed and approved requisitions are then forwarded to the purchasing agent to be ordered.
 - 1. Purchasing agent orders the item(s).
 - 2. The item(s) is received by maintenance (unless other arrangements are made by the purchasing agent). A track-it must be placed if delivery date is known. If other arrangements are made, the Building Site Representative will be responsible for verifying the packing slip with the item(s) received and sending the packing slip to the purchasing agent with their signature and date received signifying that all items were accounted for.
 - 3. The item(s) are verified with the packing slip and then with the requisitions by the purchasing agent.
 - 4. Maintenance delivers item(s) to appropriate sites.
 - 5. Purchasing agent matches the bills with the requisitions and forwards them to Accounts Payable.

IV. REFERENCES

Procurement and Bid Policy – BA080

Sanilac CMH Database - Purchase Requisition (formerly Form #0086)