**1. Purpose:**

To outline for all staff the procedure for completing order forms for procuring goods or services for the School.

1. **Procedure:**
   1. All orders for goods or services must comply with the University policy on procurement of goods or services (details available from the Purchasing office web page [http://www.qub.ac.uk/directorates/FinanceDirectorate/Purchasing/](http://www.qub.ac.uk/directorates/FinanceDirectorate/Purchasing/%20) ).
   2. All orders must be presented to the Store on the standard School requisition form, [http://www.ch.qub.ac.uk/forms/](http://www.ch.qub.ac.uk/qubonly/forms/stores-order-form_2012.xlsx) giving as much detail as possible and with all relevant fields completed in block letters or type (see below).
   3. **To be completed by end user**
      1. Company Details – For existing, well established suppliers, a brief description of the supplier to be used is suffice. For new suppliers the full name of the company with all relevant contact details should be provided.
      2. ID Reference – Found on your store card on the side bearing your name and below the barcode.
      3. Locker number - Indicate the locker that you wish to have your goods placed in when they have arrived into the school and are ready for collection.
      4. Name, telephone number and e-mail address – Insert your name and contact details
      5. Name of Supervisor – Insert the name of your supervisor.
      6. Location of goods – Insert the room number where the goods are to be used
      7. *Special requirements – If there is any additional information relating to the order that could be of use to either the store or supplier please indicate it here (eg quote reference)*
      8. Catalogue Number – If a catalogue / part number is available please enter it carefully in this box.
      9. Description of material / Service – enter a brief description of the goods / service that you require but with enough detail to let the supplier know exactly what is required. Please ensure that all items are listed including delivery costs where applicable.
      10. Unit size – If the item comes in a multi pack (eg bag of 100) or a specific pack size (eg 10g) please indicate this here.
      11. Qty – Indicate the number of items or packs that you require.
      12. Unit price EX VAT – insert the price per unit that you are expecting to pay before VAT is added. If the company cannot supply you with an EX VAT price please make a note in the special requirements box.
   4. **To be completed by your supervisor**
      1. Project – insert the project code.
      2. Sub Analysis – If the project listed is to be sub analysed indicate the sub analysis code to be used.
      3. VAT “Zero” Rating – If the order is to be exempt from VAT (eg Medical research) please sign in the box.
      4. To be reimbursed – If the goods or service are to be fully or partially reimbursed to the project then please tick the box and indicate who will be reimbursing the goods in the special requirements box.
      5. Signature of Supervisor – All completed order forms must be signed by the supervisor of the end user. This indicates that they (the supervisor) have ensured that all necessary COSHH forms and risk assessments have been completed by the end user and that chemicals or equipment being purchased will be stored, used and disposed of in a safe and legal manor and that the goods or services are being purchased in line with the University policy on procurement of goods and services. [http://www.ch.qub.ac.uk/safety.html](http://www.ch.qub.ac.uk/safety.html%20)
      6. Travel – All travel must be approved in advance by your line manager or a person of higher seniority than the line manager. By signing this form the signatory indicates that they understand all the risks involved in travel and agree to take all reasonable precautions to minimise the risks. <http://www.qub.ac.uk/directorates/FinanceDirectorate/Purchasing/TravelonUniversityBusiness/> or

<http://www.qub.ac.uk/directorates/AcademicStudentAffairs/Publications/DASAHealthandSafetyManual/Part3UniversityPolicyandProcedures/Filetoupload,237982,en.pdf>

* + 1. The supervisor should also hatch out any unused lines on the form to prevent additional items being added to the form without their knowledge
  1. **To be completed by project PI or Nominated signatory**
     1. Funds checking – It is expected that the PI on all research projects will funds check the project to be used before signing and submitting the form. For all other projects funds checking will be carried out by either the authorised signatory or stores / school finance office prior to order. Any form that has not been funds checked by the PI of a research project will be returned without being ordered. For other projects the order will not be placed if the project does not have sufficient funds to cover the cost of the requisition.
     2. PI / Authorised signature – All forms must be signed by an Authorised signatory. This will either be the PI of a research project or any one of the five nominated signatories (C. Hardacre, D. Rooney, S. Bell, or T. Sewell). No order will be processed without this.
  2. **Additional information**
     1. Orders below £2500 EX VAT only require a completed requisition form. If you have a quote attach it to the form but this is not compulsory.
     2. Orders with a value of more than £2500 EX VAT but below £10000 EX VAT must be accompanied by 3 competitive quotes or as many quotes as could be obtained and a letter explaining why no more quotes could be obtained.
     3. Orders with a value of more than £10000 EX VAT but below £30000 EX VAT must be accompanied by 4 competitive quotes or as many quotes as could be obtained and a letter explaining why no more quotes could be obtained.
     4. Orders with a value of more than £30000 EX VAT are subject to competitive tender (contact T. Sewell at earliest opportunity).

**3. Procedure History:**

3.1 This procedure was first compiled on the 01-6-12 and there has been no revision to date.