



Office of the City Auditor Policies and Procedures

Number: 7.8.3

Title: Purchasing Requests

Original Date:
Revision Date:
Approved by:

01/05/2004

03/11/2005

I. Policy

OCA staff shall submit a Purchase Request Form to request purchases of items for the office. To request the purchase of books, OCA staff shall submit a Book Purchase Request Form.

II. Purpose

The purpose of the request process is to provide staff an opportunity to request purchases outside of standard items purchased by and for the office and to ensure that purchases are approved through appropriate channels and processed appropriately.

III. Definitions

- A. **Purchase Request Form** - A form that identifies the item requested, the needs that will be met by the purchase, and all costs, purchase category, and activities associated with the purchase. The information provided on this form is meant to assist the City Auditor (CA) or the CA's designee make decisions regarding purchasing requests. The information, if the request is approved, also assists the Administrative Specialist in procuring the purchase. The Purchase Request Form is attached at the end of this policy.
- B. **Book Purchase Request Form** - See definition above for the Purchase Request Form. The Book Purchase Request Form also identifies the library category to assist in properly shelving the book(s) upon arrival. The Book Purchase Request Form is attached after the Purchase Request Form at the end of this policy.

IV. Procedures

- A. All **OCA staff** are responsible for completing the appropriate Purchase Request Form, attaching supporting documentation, and submitting it to the **CA** or the **CA's designee** when requesting office purchases.
- B. A completed Purchase Request Form will be submitted to the **CA** or the **CA's designee** who will review the request to ensure that funds are available and that the appropriate categories (Object Code and Activity) have been identified.
- C. The **CA** or the **CA's designee** will then approve or deny the request based on availability of funds and needs of the office. Decisions will be made within a week of receipt.
- D. Approved requests will be submitted to the **Administrative Specialist** to be purchased. Upon receipt of purchased items, the **Administrative Specialist** will notify the requestor of the order's arrival.

PURCHASE REQUEST FORM

NAME _____

REQUEST DATE _____

DESCRIPTION OF REQUESTED ITEM _____

For book requests, please use the separate Book Purchase Request Form.

CATEGORY:

- ___ Subscriptions (6633)
- ___ Office Supplies (7500)
- ___ Small Tools/Equipment (7600)
- ___ Software (7580)
- ___ Minor Hardware (7610)
- ___ Other _____

FOR ACTIVITY:

- ___ Audit (7101)
- ___ Investigations (7102)
- ___ General Admin (8790)
- ___ All Activities (pro-rated)

PURPOSE OF PURCHASE (What value does this provide for the office?)

PURCHASE PRICE PER ITEM \$ _____

QUANTITY REQUESTED x _____

TOTAL ESTIMATED PURCHASE COST \$ _____

******* ATTACH ORDERING INFORMATION FOR PURCHASE *******

APPROVALS

Budget _____

Date _____

DCA _____

Date _____

PURCHASE TRACKING (Admin Use Only)

Request Received By _____ **Date** _____

Order Processed By _____ **Date** _____

Order Received By _____ **Date** _____

BOOK PURCHASE REQUEST FORM

NAME _____

REQUEST DATE _____

DESCRIPTION OF REQUESTED ITEM _____

CATEGORY:

Books (7486)

Accounting and Finance

Industry Specific

Audit Practice

IT Audit

Audit Standards

Performance

Business Management

Project Management

Certifications, Training, and Self-Help

Software

Fraud

Statistics and Data Analysis

General Government and Public Policy

Other _____

FOR ACTIVITY:

Audit (7101)

General Admin (8790)

Investigations (7102)

All Activities (pro-rated)

PURPOSE OF PURCHASE (What value does this provide for the office?)

PURCHASE PRICE PER ITEM \$ _____

QUANTITY REQUESTED x _____

TOTAL ESTIMATED PURCHASE COST \$ _____

******* ATTACH ORDERING INFORMATION FOR PURCHASE *******

APPROVALS

Budget _____

Date _____

DCA _____

Date _____

PURCHASE TRACKING (Admin Use Only)

Request Received By _____ **Date** _____

Order Processed By _____ **Date** _____

Order Received By _____ **Date** _____