



SBF Requisition Form Instructions

This form should be completed when using Stony Brook Foundation funds to requisition commodities and/or services, for direct vendor payments (invoice attached) or for reimbursement to employees (except travel)

Please Note:

- To help guide you in completing this form – alert messages will pop up if you skip a mandatory field. “ INCOMPLETE” will appear on the form until all the mandatory boxes are populated
- The “**Requisition Number**” field will auto populate with a unique 12 digit # once you fill in the *Requisitioner Name* box – the first 6 digits capture the year/month/date; the 6 digits after the dash are random numbers. For tracking purposes, it is important to use separately numbered forms for each requisition request

1. **Fiscal Year** – enter the year the service was completed

2. **Check Boxes:**

- **Check one box** - “Purchase Order” or “For Payment”
- **Check one box** – “Vendor” / “Outside Party” / “Employee” / “Student”

3. **Supplier/Payee Remittance:** provide the Vendor’s Name, Stony Brook ID# (if an Employee or Student), Address, Phone Number, Fax Number and E-mail

****PLEASE NOTE: E-MAIL is a MANDATORY FIELD****

4. **Requisitioner Information:** provide the Requisitioner name, Department Name, Stony Brook Zip Code, Need by Date, Office Phone Number and Building & Room #

5. **Payment Information:** Please fill in this section if the requisition is for direct vendor payments

6. **Department Information:** enter the Account Name, Account #, GL Code, Department Name, Stony Brook Zip Code, and Account Director’s name

7. **Item Information:** provide the Item #, Description, Quantity and Unit Price (*The quantity must be entered along with the unit price for the grand total to be correct*)

- For **invoice attached payments** enter vendor’s invoice information - please use one line for each invoice
- For **employee reimbursements** enter receipted amount - please use one line for each receipt.

8. **Justification / Purpose:** All Stony Brook Foundation requisitions must have a written justification /purpose of purchase. This should closely align with the donor’s intent/ account description as noted in ERAS

9. **Original Authorized Signature:** Once complete, please print out the form and have it signed and dated by the **authorized signatory** on the account as noted in ERAS. If the requisition is for the Account Director, their direct supervisor must sign

10. **Check Distribution**

- **Check one box** – “Mail” / “Pick up at SBF” / “Wire Transfer”

Once the requisition is complete, please attach the proper SBF Checklist with the required justifications and backup documents to the requisition and forward to Stony Brook Foundation for processing