

## **CUNYfirst Business Procedure - Requisitions for Goods and Services – Roles and Approvals**

Requests for goods and services in CUNYfirst are made by a broad group of employees at the colleges and CUNY's Central Office. To ensure that all requests for goods and services are approved appropriately, within budget, and are in compliance with internal controls, the Office of the University Controller has established a procedure for Requisition Approvals that will be implemented in CUNYfirst.

### **Requestors**

- For all requisitions, the **Requestor** in **CUNYfirst** is defined as the person who is responsible or/accountable for the purchase.
- The **Requestor** may be the primary beneficiary of the goods or services, or
- The **Requestor** may submit requisitions on behalf of a broader set of beneficiaries (such as faculty, students, or department staff). In this case, the **Requestor** is still accountable for the purchase but is not the primary beneficiary of the goods/services.

The CUNYfirst system allows a **Requestor** to designate another person (Creator) to enter requisitions on his/her behalf. To accommodate this requirement, the **CUNYfirst** system has been designed to do the following:

- Allow a **Creator** to create requisitions on behalf of Requestors. Creators can also enter receipts for requestors.
- Allow a **Requestor** to have the role of "Creator" to create requisitions on behalf of other **Requestors**.

### **Approval Procedures**

All requisitions must be approved in CUNYfirst by:

- The **Requestor's Supervisor**, regardless of who creates the requisition.
- The appropriate **Department Budget Approver(s) Level 1 and Level 2** (if level 2 is needed)
- The specific **Category Approver** for the following goods and services. For specifically identified goods and services, including information technology, hazardous materials, outside legal services, construction funded from operating funds, and furniture/equipment, specific category approval is required. With the exception of outside legal services, the requisition will be routed to the appropriate category approver based on the business unit of the user who created the requisition.
  - Information technology requisitions will be routed in **CUNYfirst** to the CIO and/or his/her designee/s.
  - Hazardous materials requisitions will be routed for approval in **CUNYfirst** to the Hazmat/OSHA Manager and/or his/her designee/s.
  - Construction requisitions will be routed in **CUNYfirst** to the Facilities Manager and/or his/her designee/s for approval.
  - Furniture and other non-IT equipment requisitions will be routed in CUNYfirst to the Facilities department for approval.
  - Requisitions for outside legal services will be routed in **CUNYfirst** to the CUNY Office of General Counsel for approval.
  - Each category approver is responsible for ensuring that requisitions routed to them satisfy all applicable CUNY requirements and policies related to the relevant category of goods or services.
- **Under no circumstances, can a Requestor approve his/her own requisition.**

## Executive Requisitions and Approvals

When goods and/or services are requested by College Presidents, and requisitions are created on their behalf, it is recommended that the supervisor approval in **CUNYfirst** be entered by the VP of Finance and Administration or the Provost. For the Central Office, goods and services requested by the Chancellor and Executive and Senior Vice Chancellors will be approved in **CUNYfirst** by the Director of Internal Audit.

Requisitions submitted by direct reports to the College Presidents, the Chancellor, Executive and Senior Vice Chancellors, and Vice Chancellors would ordinarily be approved in **CUNYfirst** by those executives. These senior level executives should delegate their **CUNYfirst** system approval role to a member of their staff. Approval of requisitions in **CUNYfirst** must be based on the documented senior level executive's concurrence with the content and cost of the requisition.

## Procurement Audits

The requisition approval process will be incorporated into all Procurement audits.

## CF Requisition Workflow

