

## NPS Purchase Request Form Instructions

**Purpose:** The Purchase Request (PR) form is used to submit requests for new purchases, financial assistance, fleet, and modifications to the Financial and Business Management System (FBMS).

**Requirements:** The PR form must be completed by the requesting program office and approved as required by local office policy. The PR should only be used for purchases that require entry into FBMS (i.e., not for purchases that can be made using the Government-wide commercial purchase card, with the exception of Radio purchases). PRs that do not require FBMS entry will be rejected by the FBMS Requisitioner.

### **Additional Information:**

- Prior to submitting form to Requisitioner for entry into the FBMS and necessary approvals, all applicable fields for the specific PR type must be completed on the PR form. Please note, the form will not allow for edits once it has been digitally signed.
- Upon completion of the form, upload the saved PDF along with all applicable attachments to the location provided by your Regional/Park/Program Office. Once the PR is submitted, it will be assigned to an FBMS Requisitioner who will enter your request into FBMS.
- Several sections of the PR form require information regarding FBMS Master Data. Additional resources are provided to aid in determining the appropriate FBMS Master Data for the particular purchase being requested. Please refer to the [FBMS SharePoint site](#) for helpful resources on completing this form. Our internal [ACQ/FA Helpdesk site](#) is another great resource.

### **Instructions for Completing the Purchase Request Form by Section**

#### Top Section

- Date of Request: Date the PR Form is submitted to the FBMS Requisitioner
- Internal Tracking Number: Optional number used for tracking locally at region/park/office
- FBMS PR Number: Once PR is submitted in FBMS, enter the PR number (Requisitioner to complete)

### **PR Requisitioner & Requestor Information**

- Requestor Name: Enter the name of the end user of the required goods or services.
  - Phone: Requester's telephone number
  - Email: Requestor's email address
- Requisitioner Name: Requisitioner to enter his or her name; this is the name of the person completing and submitting the transaction in FBMS.
  - Phone: Requisitioner's telephone number
  - Email: Requisitioner's email address

### **PR Type (Check One)**

Select the applicable PR type from list below (descriptions included)

- **Funded:** Select this type if the request is an acquisition action requiring funding (e.g. Purchase Orders, Contracts, awards marked "SAF," Task Orders, Delivery Orders, BPA Calls, Inter/Intra-Agency Agreements or funding-related modifications to any of these).
- **Pre-Award change to existing PR:** Select this type if making a change/modification to an existing PR that has *not yet* been awarded.

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- *Note: Please be sure to include the existing PR number within the PR Header Text Section (see below).*
- **Post-Award Modification:** Select this type **only** if a deobligation modification to an existing award is required per Departmental and/or Regional Guidance.
  - *Note: If you are adding funds to an existing contract or exercising a contract option year, please **do not** select this PR type. Rather, select Funded PR as the PR type and provide the PO number in the Header Text section of the form.*
  - *Note: Please be sure to include the existing PR number within the PR Header Text Section (see below).*
- **Unfunded:** Select this type if creating a BPA, IDIQ or BOA. Do not select if request is a SAF funded PR. See NPS Contracting Officer's Technical Instruction (COTI) 1443.16-02, Revision 1 for further instructions on how to fund the required minimum guarantee for IDIQs.
- **AutoChoice:** Select this type if purchasing a vehicle via GSA AutoChoice.
- **Post-Award AutoChoice Modification:** Select this type if a modification to an existing AutoChoice obligation is needed and cannot be accomplished using the AP\_AOPO or PRF\_AOO roles to modify the obligation directly.
- **Grants/Financial Assistance Only**
  - **Grant PR:** Select this PR type for all funding-related FA actions, including \$0 Cooperative Agreements and changes to accounting information to already existing FA awards.
  - **Post Award Grants PR:** Select this PR type for FA deobligations greater than \$25K.

### **PR Header**

- PR Title: Enter relevant details to identify the PR, such as project name and title
  - *Note: The PR Title section is limited to 40 characters*
  - *Note: Please do not use any special characters (\*, &, #, etc.) or copy/paste any HTML directly from another document type or website.*
- Issuing Office (Purchasing Group): The office that will receive the requisition for processing in PRISM
- FBMS COR/Receiving Official: The individual with the FBMS COR role who will receive notification of IPP invoices and will enter Goods Receipts and Service Entry Sheets into FBMS.
- Requesting Region/Park/Division/Program Office
- Originating Office FBMS Code: If known, enter the FBMS Originating Office Code (begins with "300"); if not known, complete the following postal address fields or refer to FBMS SharePoint to locate [Originating Office FBMS Code](#):
  - Address
  - City
  - State
  - Zip

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### **PR Header Text (1,650 characters max.)**

Enter PR project name, title and other information that may help to identify the requirement. This may include information that should be brought to the attention of the Requisitioner, PR approvers or Contracting Officer. If the PR is to change or modify an existing PR (pre-award change) or an existing award (post-award modification), please include any helpful information regarding the reason for modification and the details of the change.

- For acquisitions of property, please include appropriate details of property, such as FBMS J1 justification number, license plate, inventory numbers, etc.
- For Betterments to existing assets, please clearly make note in header text and reference the FBMS Main Asset Number.
  - *Note: The Property Approver will need to manually create a sub-asset and reference the sub-asset on the PR line during approval.*
- *Note: The PR Header Text is limited to 1,650 characters.*
- *Note: Please do not use any special characters (\*, &, #, etc.) or copy/paste any HTML directly from another document type or website.*

### **Enter and Select the Appropriate Information**

- IDIQ/BPA/GSA Schedule: Enter the contract number for one of these, if applicable.
- Master Cooperative Agreement: FA only; include number if FA action will be against a Master Cooperative Agreement.
- PMIS: If request is related to a project in PMIS, enter PMIS number.
- Ratification? (Yes or No): Typically, enter no. Enter yes, if the request is a funding action for an unauthorized commitment.
- SAF? (Yes or No): Typically, enter no. Enter yes, if the action can be issued Subject to Availability of Funds and the funds are not currently available or if it is a Radio purchase at or below the micro-purchase threshold and will not be issued via PO in PRISM.
- Suggested Vendor: Maximum of 200 characters; can have multiple vendors. Include DUNS numbers if available.
- Suggested COR/ATR: Individual suggested for designation as the CO's Representative or Agreements Technical Representative (ATR); may also be the FBMS COR/Receiving Official.
- Name of CO or Agreements Officer: If a particular CO or Agreements Officer is requested, or one is already working on a PO that is being modified, list the individual's name here.
- Existing PR Number: To be entered if PR Type is a Pre-Award change to existing PR.
- Existing Purchase Order Number: To be entered for modifications, exercise of option years, deobligations, etc.

### **FBMS PR Approvers**

Supervisor and Funds Approvers are required to review all PRs. Additional Approvers may be required depending on the UPC selected. Names and email addresses are required for all Approvers entered.

## NPS Purchase Request Form Instructions

### PR Line Item Detail

- Item Category
  - Select “**By Dollars**” (AU) if the purchase is to be **received by dollars (SES)** and/or requires partial payments. Should be chosen unless it is accountable property AAC=L or A.
  - Select “**By Quantity**” (EA) if the purchase is to be **received by quantity (GR)**.
- Short Text: Enter a brief description of the line item.
  - *Note: Please do not use any special characters (\*, &, #, etc.) or copy/paste any HTML directly from another document type or website; as this may cause the vendor to not be able to invoice.*
- Quantity
  - For the purchase of goods or services that have an Item Category of “By Dollars” (AU), enter “1”
  - For the purchase of items that have an Item Category of “By Quantity” (EA), enter the number of items requested.
  - *Note: Capitalized personal property items (\$15,000 or greater) must be on separate lines with a quantity of “1”*
- Unit Price or Lump Sum Price
  - For the purchase of goods or services that have an Item Category of “By Dollars” (AU), enter the Lump Sum Price.
  - For the purchase of items that have an Item Category of “By Quantity” (EA), enter the Unit Price for one (1) of the items.
- UPC: Enter User Product Code (UPC) for the item(s) requested
  - *Note: How UPCs are determined is region/park specific; this may require communication between Requestor, Contracting Officer, MABO lead, Budget staff and/or Requisitioner.*
  - *Note: Please refer to NPS-specific UPC Crosswalk for assistance: [NPS UPC Crosswalk](#).*
- Line Total: Enter total of the line (form will calculate manually excluding any totals from attachment)
  - For the purchase of goods or services that have an Item Category of “By Dollars” (AU), enter the Lump Sum Price.
  - For the purchase of items that have an Item Category of “By Quantity” (EA), multiply the quantity by the unit price.
- Total: Calculate the total all the lines and enter here (form will calculate manually excluding any totals from attachment)
  - Total from PR Attachment: If a PR attachment form is necessary for additional lines, please be sure to calculate and add the total from that form as well.

### PR Accounting Information

Enter accounting data. If only one accounting line, select single account assignment radio button (in SAP)

- *Note: If multiple lines of accounting are necessary, use whole even numbers and choose Distribute By Amount, translate amounts to percentage with two or less decimal places, when possible (i.e. correct split: \$100 split 50/50, \$2000 split 25/25/25/25)*
- *Note: FBMS does not allow for one funding account to fully deplete before depleting the second account, or for the Requisitioner to control the order of funds.*
  - *If depleting funds in a particular order is necessary- it is recommended that a separate line item is created for each funding line*

## **NPS Purchase Request Form Instructions**

- Line No: This is the PR line item number and should correspond to the line item number(s) in the item detail section above.
- Allocation (Amount/Percentage): Enter the percentage of the total amount to be allocated to a particular WBS or Work Order
  - *Note: Use a Work Order only for Fleet purchases.*
  - *Note: Use dollar amounts (instead of percentages) if using multiple accounting lines (MAS)*
- Chargeable Object (WBS/Work Order): If available, enter Work Breakdown Structure (WBS) or Work Order
  - *Note: If a WBS/WO is available, it is not necessary to populate Cost Center, Functional Area or Fund.*
  - *Note: UPCs with an Account Assignment Categories of "P" (Project) require a WBS; Account Assignment Categories of "W" (Work Order) require a Work Order. Project information is determined by the UPC type. This is important for collecting total cost of ownership of real property assets.*
- Cost Center: Enter the Cost Center code.
- Functional Area: Enter the Functional Area code.
- Partial Fund: Enter 3-digit Fund Code; first 2 digits are the last 2 digits of beginning budget fiscal year; the third digit is the last digit of the ending budget fiscal year.
  - Example: 144 = FY 2014 funds
  - Example: 134 = FY 2013/2014 multi-year funds
  - Example: XXX = FY 2012 and prior no-year funds for converted documents and other no-year funds that do not require source year funding
  - Example: 13X, 14X = no-year funds that require source year funding
- Delivery Date OR Period of Performance
  - For the purchase of items that have an Item Category of "By Quantity" (EA), enter the Delivery Date for the line item.
  - For the purchase of goods or services that have an Item Category of "By Dollars" (AU), enter the Period of Performance, or the **beginning** and **end dates** for which the goods or services are to be received.
  - *Note: Due to D8 changes, these fields are now required to correct previous errors often associated with the dates.*

### **Delivery Address**

Use this section to provide delivery information for the delivery of goods or rendering of services. If using multiple delivery addresses, enter the corresponding line item numbers. If extra space is needed, provide additional delivery information on a separate page as an attachment.

- In Reference to line(s) Numbers: If applicable, enter the corresponding line item number(s) for each destination (address).
- FBMS Delivery Address Code: If known, enter the FBMS Delivery Address Code (begins with "90"); if not known, enter delivery information per the postal address (Street address, city, state and zip code).
  - *Note: For assistance in finding [FBMS Delivery Address Codes](#) please use this link.*

## **NPS Purchase Request Form Instructions**

### **Accountable Property**

- Line No: This is the PR line item number and should correspond to the line item number(s) in the item detail section above.
- Responsible Cost Center: Enter Responsible Cost Center.
  - *Note: Responsible Cost Center is required for lines with an Account Assignment category (AAC) of L (Accountable) or A (Capital Assets).*
- Custodial Property Officer Name: Enter name of the Custodial Property Officer (CPO).
- CPO Code: Enter Custodial Property Officer's code.
- *Note: For assistance in locating the appropriate Responsible Cost Center and CPO, please refer to the [NPS SharePoint Site](#). The "Org Unit" column (Column A) equates to Responsible Cost Center and "Position ID" (Column D) equates to the CPO ID Number.*

### **Acquisition Attachments**

- If attaching documents, please select the applicable documents from the list provided. If you are attaching a document that is not listed, select "Other" and include a brief description of the document.

### **Financial Assistance Attachments**

- If attaching documents, please select the applicable documents from the list provided. If you are attaching a document that is not listed, select "Other" and include a brief description of the document.