

# UNIVERSITY OF PITTSBURGH PROCEDURE 05-05-01

**CATEGORY:** FINANCIAL AFFAIRS  
**SECTION:** Book and Subscription Purchases  
**SUBJECT:** Textbooks, Instructional Materials, and Subscriptions  
**EFFECTIVE DATE:** November 9, 1993  
**PAGE(S):** 5

## I. PURPOSE

To outline the process for requesting the purchase of subscriptions to periodicals and the purchase of books, supplies, or instructional material for sale to students for classroom use. It also applies to the ordering of copies of department based material such as laboratory manuals.

## II. SCOPE

This procedure applies to all University departments and student organizations.

## III. ADMINISTRATIVE RESPONSIBILITIES

University Departments/Divisions are responsible for initiating requests for purchase of books, textbooks, and printing of department based instructional materials by the deadline dates established by the Book Center/Health Book Center and Central Business Services.

The University Book Center or the Health Book Center is responsible for ordering all books, textbooks, instructional materials, and supplies sold to students and faculty, and for making the final decision on order quantities, based on previous history and the life of the book on campus.

Central Business Services is responsible for the reproduction of instructional materials sold to students and faculty through the Book Centers or the Central Business Services Copy Cat.

## IV. PROCEDURE

### A. Books Purchased For Departmental Use

Department/Division  
Requisitioner

1. Complete a FORM 0139, Purchase Requisition.
2. Forward the Purchase Requisition to the Book Center or Health Book Center, as appropriate.

Book Center/  
Health Book Center

3. If requested books are in stock, forward to the requisitioner via Campus Mail.
4. If requested books must be ordered, follow internal procedures for processing Purchase Orders.
  - a. Upon receipt, mail books to the requisitioner via Campus Mail.
  - b. Prepare a voucher coding ticket and forward, together with the publisher's invoice, to the Office of the Comptroller, Accounts Payable

Department.

5. Charge the appropriate department by completing FORM 0022 Interdepartmental Charges. See Procedure 05-06-01, Interdepartmental Charges.
  - a. When charging Grant/Contract Accounts (5-3XXXX-XXX) forward the original Purchase Requisition together with the Interdepartmental Charge form to Research Accounting.
6. Retain the original Purchase Requisition (or a photocopy in the case of 5a. above) on file.

B. Subscription Purchases - Periodicals Other Than Superintendent Of Documents And National Technical Information Service

Department/Division  
Requisitioner

1. Complete FORM 0014, Disbursement Request. See Procedure 05-06-03, Disbursement Requests for instructions.
2. Attach an original and one copy of the publisher's document (coupon order form, renewal notice, etc.) describing the desired subscription, its terms and the address to which the periodical is to be sent.
3. Forward the Disbursement Request and the attachments to Research Accounting for Grant/Contract Accounts (5-3XXXX-XXX), or to Accounts Payable for all other accounts.

C. Subscription Purchases Through Superintendent Of Documents Or National Technical Information

Service Department/  
Division Requisitioner

1. Complete a Purchase Requisition form (Stock 139).
2. Attach applicable documents described in step B2 above.
3. Forward the Purchase Requisition, together with the applicable documents to the Book Center/Health Book Center.

D. Textbooks and Supplies From External Sources (Publishers, etc.) Which Students Are Required To Purchase

Book Center/  
Health Book Center

1. Each term, notify all Department Chairmen by mail of deadline dates for processing textbook and supply requisitions. (FORM 0068, Book and Supply Form (Exhibit A).

**Estimating book requirements for a class is difficult. To avoid overestimated**

**requirements and resulting monetary losses, faculty members must observe the following procedure:**

Department/  
Division Requisitioner

2. Complete FORM 0068, Book and Supply Form, according to the attached Form Instruction Guide, or submit an E- Mail Book and Supply form according to the instructions in Exhibit B, University of Pittsburgh Electronic Mail Form.
3. Consult with the Book Center/Health Book Center to determine whether a text change would result in a heavy over-stock which may not be returnable.
4. Indicate anticipated enrollment for the course. (The Book Center/Health Book Center will make the final decision on quantities.)
5. Retain gold copy of FORM 0068, Book and Supply Form, and forward remaining copies to the Book Center/Health Book Center.
6. Request desk copies directly from the publisher, in writing, on department letterhead.

NOTE: In order to obtain the earliest possible delivery from the supplier, and avoid inconvenience to students, forward FORM 0068 to the Book Center/Health Book Center as early as possible.

Late orders for faculty who have not sent their requirements should be forwarded as soon as possible to avoid additional delays.

Properly prepared requisitions returned on time serve the Book Center/Health Book Center as guides in buying used books which can be offered to students at a savings over new book prices.

E. Late Changes

Book Center/  
Health Book Center

1. When a departmental textbook requirement is changed after the book return privilege has expired, issue a full refund to students.
2. Complete FORM 0022, Interdepartmental Charges, to charge losses resulting from late changes to the responsible department.

F. Copying Of Manuscripts Or Other Instructional Materials Which Students Are Required To Purchase

Department/  
Division Requisitioner

1. a. Complete and submit FORM 0068, Book and Supply Form, to the Book Center/

Health Book Center as appropriate.

- If permission to reproduce copyrighted material is needed, the following information must be provided:
  - Title of publication
  - Author
  - Copyright owner or publisher

or:

- b. Complete and submit FORM 0190 PITT 1883, Custom Course Material Copying Request (Exhibit D), together with a typed bibliography to the Central Business Services Copy Cat.
  - If permission to reproduce copyrighted material is needed, indicate on a Custom Course Material Copying Request.

2. The Book Centers or the Central Business Services Copy Cat can obtain copyright permissions. A sufficient lead time will be necessary to obtain permissions. The manual or article must be listed as a required text on FORM 0068, Book and Supply Form or FORM 0190 PITT 1883, Custom Course Material Copying Request.

NOTE: Central Business Services should be listed as the publisher.

3. Complete the Coursepack Request Form (Exhibit E) according to the attached Form Instruction Guide. A Coursepack Request Form must be completed for each article and a copyright page provided. Manuscripts or manuals will not be printed until copyright permissions have been received.
4. A completed Coursepack Request Form should be:
  - a. attached to FORM 0068, Book and Supply Form, and submitted to the Book Centers with the item(s) to be reprinted

or:

- b. attached to the Custom Course Material Copying Request and submitted to Central Business Services Copy Cat.

NOTE: The normal time period to receive copyright permission is four to six weeks. Manuscripts or manuals will not be printed

until copyright permissions have been received.

Book Center/  
Health Book Center

5. Determine the appropriate order quantities and prepare FORM 0008, Printing Requisition and a Purchases Order listing the items to be printed.
6. Forward the Purchase Order and the original of the item(s) to be reprinted to Central Business Services.

Central Business  
Services

7. Upon receipt of the Purchase Order, reproduce the material.

## V. EXHIBITS

[Exhibit A, FORM 0068, Book and Supply Form](#)

[Form 0068, Book and Supply Form Instruction Guide](#)

[Exhibit B, University of Pittsburgh Electronic Mail Form \(EMF\)](#)

[Exhibit C, Sample E-Mail Course Book and Supply Form](#)

[Exhibit D, FORM 0190 PITT 1883, Custom Course Material Copying Request](#)

[FORM 0190 PITT 1883 Form Instruction Guide](#)

[Exhibit E, FORM CCC 0002 Coursepack Request Form](#)

[FORM CCC 0002 Form Instruction Guide](#)

## VI. REFERENCES

[Policy FN 25, Textbooks, Instructional Materials, and Subscriptions](#) (formerly 05-05-01)

[Policy FN 10, Interdepartmental Charges](#) (formerly 05-06-01)

[Policy FN 09, Disbursement Requests](#) (formerly 05-06-03)