

Purchasing Procedures

Purchases for goods and services or for securing lodging or registrations for conferences can be made through one of the following ways:

1. Electronic Requisition:

Individual enters a requisition electronically in to the District financial software for approval by their supervisor and Director of Business Services. (See the directions for general ordering in Skyward Web Financial Management and for specific directions for ordering online from School Specialty.) Once approved, accounts payable updates the requisition to a purchase order in the financial software. The purchase order is then printed for mailing, faxing or for pick-up by the user who will make the purchase directly at the store.

Once the product is received, please confirm that you have received all of the materials or supplies that you ordered. If your order is complete, approve by writing "OK" and signing your name on the packing slip and/or invoice and return it to accounts payable at the District Office for payment. If the order is not complete, please contact the District accounts payable office.

2. Purchasing Card (P-card):

Individuals are encouraged to use District p-cards for purchasing items when possible. The staff member should receive prior approval from supervisor for check-out and use of a District purchasing card. The card user makes the purchase either online or directly at the store and then provides the receipt of purchase to supervisor (card holder) and checks the card back in. Card holder reconciles receipts in the District financial system. See purchasing card details under "Purchasing Card Procedures" for more information.

3. Petty Cash:

Individual receives prior approval from supervisor and makes a local purchase of items under \$50 and submits the receipt of the purchase to the school office for reimbursement from petty cash.

4. Check:

On occasion, the only option available to you may be to remit a check from the District. This typically occurs when classes go on fieldtrips and an entrance fee needs to be paid. Please use the "Request for Check" form with attached information that documents the need for the check and provides all of the details related to it, i.e. a list of individuals that the fee is being paid for, date, amount, vendor, etc. Please plan ahead. Checks are cut each Tuesday morning, so please plan to get the information to accounts payable by the Friday before so that it can be prepared on Tuesday.

Individuals should submit the District's tax exempt letter to vendors to avoid sales tax on all purchases. Individuals should not use personal checks or credit cards to purchase items and then seek reimbursement. Please follow the purchasing guidelines that are established for you.

Failure to follow the above purchasing procedures could result in loss of privileges of purchasing card use and the purchase may become the financial responsibility of the individual. Please see Board Policy 672 and Rule-672 for more information.

Activity Funds Purchase Order

Advisors of District student organizations and clubs should use the Activity Funds Purchase Order when ordering goods for these student organizations and clubs. The form requires approvals from the advisor, principal and a student representative of the respective organization or club. The advisor places the order with the vendor. Yellow copies of the Activity Funds Purchase Order should be submitted to the District Office. When the District receives an invoice for the product ordered, the invoice will be forwarded to the advisor for approval. Once the product is received, please confirm that you have received all of the materials or supplies that you ordered. If your order is complete, approve by writing "OK" and signing your name on the packing slip and/or invoice and return it to accounts payable at the District Office for payment. If the order is not complete, please contact the District accounts payable office.