

## PRJUSD Ordering/Requisition Guidelines

*Purchasing is here to support staff and students in pursuit of the district's educational goals. Please understand following the requisition guidelines outlined below, will assist the Purchasing Department help staff and students be successful meeting these goals.*

- All purchases for material, supplies, and services must be authorized by means of a district-approved Purchase Order.
  - Requisitions must be sent to Purchasing prior to the services or materials being ordered.
  - The Purchase Order will be created from the information provided on the Requisition. The Purchase Order will be emailed, ordered online, or faxed to the vendor. The Purchasing Department reserves the right to change a vendor when the same or similar material may be obtained at a lower cost.
  - Any individual who places an order without approval from the Purchasing Department may be liable for the payment of that order.
  
- All school sites and departments must use the electronic requisitioning process through QSS
  - To make requisition entry easier, staff/teachers may use the fillable requisition form from which the QSS user may “cut & paste” the requisition into the QSS system.
  - This form can be found at: <http://www.pasoschools.org/Page/769>. For training of staff members in the utilization of electronic requisitioning, please contact the Purchasing Department.
  
- Requisition Log/PO File
  - Sites/depts should keep a requisition log, noting requisition #, vendor, \$amount.
  - It is also advised sites/depts keep copies of their PO once it's issued.
  - Purchasing will need to know either the requisition # or PO# if an inquiry is made regarding the purchase or service.
  
- Requisitions for products should be itemized (one line per item noting description, part #, quote #, need by date, etc.) and include backup documentation (quote from vendor, online shopping cart screen shot, etc.)
  - Always note quote# or quote date in line item description if applicable
  - Always add an amount for shipping
  - Always include tax even if it is not on the quote

- Include due date if items needed by certain date
  - Include any special ordering instructions if applicable
  - Entering items individually benefits all:
    - the order goes through sooner (no/less guessing or clarifying on Purchasing's part if the attached list is a poor copy);
    - the vendor can see more clearly what is being ordered;
    - the warehouse will deliver partial shipments instead of waiting until the whole order is delivered to the warehouse (requester gets their order sooner);
    - three way matching of the packing slip, invoice & PO can occur more quickly which in turns gets payment to the vendor in a timely manner;
    - items >\$500 must be flagged as a fixed asset per Ed Code;
    - attachments are needed as backup documentation for the order.
  - Exceptions for a large order (10 lines +) can be made if there is a clear quote from a vendor and/or if a large order is broken down into smaller, more manageable orders.
    - Amazon is not a good vendor for this exception; see Amazon section below.
- Verify current information (vendor, item #'s, pricing, etc.) when entering requisitions, i.e., do not use outdated catalogs. Consider verifying prices on-line, calling vendors and requesting education discounts, or contact Purchasing for assistance.
  - Verify user has correct vendor and/or vendor information is up-to-date; POs are delayed or orders get kicked back due to wrong information.
  - "District Choice": If there are materials, equipment, supplies or services staff wishes to order, but do not have a suggested vendor or would like assistance from the Purchasing Department to obtain quotes and find the best pricing, please provide a full description of the item/service required and use vendor ID 014083, "District Choice" on the requisition. Purchasing will then contact the requester & coordinate sourcing the item/service.
  - Tax & Shipping: always add sales tax & include estimated amount for shipping.

- All IT related equipment or software purchases must be approved/ordered by IT/Ed Tech:
  - Requestor must submit IT work order and proceed as directed by IT.
- Requisitions for appliances or other equipment which require some kind of utility hook up/set up must be reviewed & approved by MOT; an MOT Work order # should be included on the requisition so Purchasing knows MOT has been notified.
- Requisitions for open PO's should include department name and authorized user(s), brief description of items to be purchased and/or purpose for the purchase, school year, and be in a realistic not to exceed amount for the entire school year.
- Requisitions for services or items requiring installation should include brief description of service, approved rates/lump sum for service, term of service, and include proposal and/or agreement as an attachment; an MOT Work order # should be included on the requisition so Purchasing knows MOT has been notified.
- New vendor set up requests: send vendors set up requests to the Fiscal Services; please provide full contact info for new vendors: company name, address, phone & fax, website and/or email.
- Cal Card Purchasing Card/US Bank vendor should be used only if the vendor will not accept a purchase order:
  - Include website address/vendor name at the END of the requisition, not the beginning.
  - If a vendor accepts POs, please use their PO form and email Fiscal Services to set up the vendor file.
- Office Depot Online Ordering: Orders for Office Depot should be for office/classroom supplies only;
  - Many items available on the Office Depot website are not appropriate for District purchase or Office Depot is not the best vendor:
    - examples include: food/snacks/water/custodial products/IT peripheral items; items such as these will be approved or denied on a case by case basis;
  - Keep close track of the remaining balance on your site's/dept's open PO to prevent orders being placed on hold.
  - Sites/Depts will be responsible for handling Office Depot returns.

- Amazon:
  - use Amazon vendor code: 014117 instead of US Bank;
  - limit Amazon requisition/shopping carts to 10 items; enter additional requisitions/shopping carts as needed;
    - create Amazon shopping cart and requisition at same time so requisition # can be used at Amazon check out
    - at Amazon check out, use requisition # with an “R” in front of it, requestor name, site #, in PO field: example: R170xxx/Rucker/KW/050
    - note req#/name, etc. and any other pertinent information in comment section
    - continue to checkout: choose PRJUSD Warehouse as ship to location and enter requisition # in “deliver to” field (same format as PO field)
    - choose PRJUSD account as payment option;
    - save a copy of order confirmation & attach to requisition
    - copy of shopping cart/order confirmation must be attached to requisition
  - All Amazon order packing slips/receiving documentation must be forwarded to the Warehouse w/PO # noted on the paperwork if found inside box/delivery.
  
- Any agreement requiring an authorized district signature should be forwarded to Business Services for review, obtain authorized signature & possible Cabinet and/or Board Approval.
  
- Returns/RMA’s: Sites/Depts may handle returning items to a vendor on their own or request coordination/assistance through Purchasing
  - If Purchasing coordinated return, site/dept must provide to Purchasing:
    - PO#, item #, quantity, reason for return, indicate replacement item & price or return for credit, prepare/store items for return
  
- Business cards: Business cards may be ordered by completing the business card order form, obtaining the supervisor’s signature, and sending in the hard copy of the form to Purchasing. Please do not scan and email the completed form. Contact Purchasing to obtain the latest version of the blank business card order form.