

PURCHASING



Kristi Russell

IF YOU ARE NEW...

- Contact our Purchasing Specialists if you need assistance with creating requisitions and/or budget coding:

Toni Chadwick

tonichadwick@misdmail.org

Extension 6091

Karen Fichte

karenfichte@misdmail.org

Extension 6090

- We are happy to help you understand the process and can walk you through it by phone using Teams.
- A PowerPoint slide deck with screen shots is available for review on the Purchasing OneNote under the "Information" tab: <https://tinyurl.com/Purchasing-OneNote-Training>

A RETURN TO PRE-PANDEMIC PROTOCOLS...

- The 20-21 school year presented numerous unique challenges that required flexibility on everyone's part. In that spirit, Purchasing approved the use of a variety of unapproved vendors and credit card purchases.
- For the 21-22 school year, we are now returning to our normal purchasing processes:
 - Use approved vendors with valid contracts in Skyward;
 - Credit cards are the last option for form of payment – vendors should accept PO's or a check from the district.

CHANGES FOR 21-22

AMAZON PURCHASING

- Should not be your "first choice" vendor;
- Quote form is now a required attachment on all Amazon requisitions. Examples are in the OneNote: <https://tinyurl.com/Purchasing-OneNote-Training>
- Quotes must be from current approved vendors.
- If item(s) are not available from other approved vendors, contact Purchasing for next steps.

CHANGES FOR 21-22

AMAZON PURCHASING

- Example: Ordering Sharpies, post-it notes or any office supplies or art supplies
 - The quote must include current vendors - Staples or Matthews, School Specialty and Amazon with pricing.

- Example: Technology supply items must have quotes from current vendors
 - The quote must include current vendors, CDWG or Connections E-Commerce's store front and Amazon pricing.
(NO Computers, laptops, iPads)

CHANGES FOR 21-22

TRAVEL CARDS

- Travel credit cards are now available for staff to check-out and pay for:
 - Hotels charges (room rate, city/county occupancy tax);
 - Parking charges if assessed by the hotel;
 - Student meals during school sponsored travel.
- AP will no longer issue checks for hotel charges or student meal money.
- Select vendors "Travel/Hotel" or "Travel/Meals" in Skyward, and always make these type of requisitions a Blanket PO.

CHANGES FOR 21-22

TRAVEL CARDS

- Staff must bring their approved PO to Purchasing the day before travel to check-out the card. Cards and receipts must be returned to our office the day after travel concludes. We will receive in Skyward and forward receipts to AP;
- Travel credit cards are NOT to be used to pay for meals (unless traveling with students), incidentals, fuel, or transportation charges. Those items must be reimbursed on the Travel Reimbursement Form;
- Staff traveling on 199, 461, or 865 funds can use the card - contact us for procedures if traveling on Federal funds.

CHANGES FOR 21-22

- Coding changes to note:

- Vehicle registrations – Object Code 6499

- Vehicle inspections – Object Code 6249

- Staff trainings, conferences, webinars, online courses (except Region ESC's) – Object Code 6411

CHANGES FOR 21-22

- **Crosspoint Communications has a new name – Mobile Communications of America;**
- **The "rebranding" of their company will not affect orders or invoicing.**
- **New model number for standard walkie talkie radio and updated pricing is listed in the Purchasing OneNote.**

CHANGES FOR 21-22

- **United Supermarkets - Market Street is now listed in Skyward as just "Market Street". They do not take PO's but will take a credit card;**
- **Business card vendor is changing to Dallas ISD Graphics Department – do not use FlexPress;**
- **Staples contract has switched to "Sourcewell" which will give the district more competitive pricing for office supplies.**

CHANGES FOR 21-22

- Citibank PO's for purchases from approved vendors – create a YMA requisition, choose the Vendor's name in Skyward (no longer Citibank) and select the contract.
- Citibank PO's for purchases from unapproved vendors – create a YDA requisition, choose "Citibank" for the Vendor's name in Skyward, and enter the commodity code approved by Purchasing. You will still need to list the actual vendor's name in both the master description and the line item description.

CHANGES FOR 21-22

- **Contract Approval Forms no longer need a copy of the requisition attached. Just include the full budget code on the form so Purchasing can verify that funds are available to encumber for the total amount of the contract.**
- **All requisitions for contracted goods and services MUST have a signed/approved Contract Approval Form attached or it will be denied.**

FRIENDLY REMINDERS

- \$1.00 PO's for T-Shirts, Fundraisers, and Field Trips are not allowed. The requisition will need to reflect the line-item descriptions and pricing from the quote, and the quote **MUST BE ATTACHED** to the requisition in Skyward to gain approval.
- E-Commerce PO's cannot be edited once approved.
- Hobby Lobby and Mardel's both require a store card and a current tax-exempt card along with the PO in order to make a purchase.
- All requisitions for general supplies must designate "classroom supplies" or "office supplies" with the correct corresponding function or they will be denied.

Cody Cannon

FRIENDLY REMINDERS

- Make sure the vendor you want to use is approved – download and check the Approved Vendors List on Purchasing’s webpage.
- Just because a vendor is in Skyward does NOT mean they are approved.
- If a vendor is in Skyward AND a **CURRENT** contract is assigned to that vendor, then the VENDOR is approved.
- If the vendor does not have a contract listed, contact Purchasing **BEFORE** requisition entry.

FRIENDLY REMINDERS

- YMA requisitions (the default format) should have a contract number. YDA requisitions need a commodity code for each item. These will not be selected until you get to the line item entry.
- **DO NOT USE A COMMODITY CODE AND A CONTRACT NUMBER!**
Always use the contract code first. Only use a commodity code if a contract number does not exist.
- If you notice anything weird about the contract (expiration date has already passed) please let Purchasing know so we can make the necessary correction(s).

FRIENDLY REMINDERS

- All vendors that access your campus **MUST** have a current Vendor Badge. Please screen your vendors and contact Purchasing if you have an issue.
- All bounce house rentals must be cleared through Risk Management before submitting a PO to the vendor. Workers that set-up/tear down before and after school do not need a Vendor Badge. All vendor staff that stay and work the event must be badged.
- All DJ's must have a current Vendor Badge and clearance from Risk Management if working an event on district property.

FRIENDLY REMINDERS

- Blanket PO's should be used only with vendors such as Sam's, Kroger's, Walmart, Mardel's, Home Depot, etc. Make sure to send the shopper with a district Tax Exempt form.
- District credit cards and receipts must be returned within 24 hours of check-out.
- Blanket PO's are for one-time use ONLY.
- Remind staff members that shop to NOT EXCEED the amount of their PO and to check the receipt for tax while at the store.
- When shopping on Amazon, select PRIME vendors only – PO's with shipping charges will be denied.

And speaking of Amazon...

FRIENDLY REMINDERS

- Amazon Cut-Off Dates for FY 21-22:
 - Thanksgiving Holiday Cutoff – Friday, 11/12
 - Winter Holiday Cutoff – Friday, 12/3 (just 1 week after we return from Thanksgiving break)
 - Spring Break Cutoff – Friday, 3/4
 - End of Year Cutoff – 4/29

PLEASE PUT THESE DATES IN YOUR CALENDAR!!

EDUCATION FOUNDATION GRANTS

- Education Foundation grant funds must be used with approved vendors.
- Partner with your grant writing teachers to help them find approved vendors and submit the correct budget coding with their application. Grant applications without an approved vendor(s) or correct budget coding will not be approved.
- If you need sourcing assistance, please let us help!
- Technology items will still need to be approved by Technology prior to purchase.

WAREHOUSE/DISTRIBUTION CENTER

- **Records Management** has a new process. The Records Management Guidebook can be located on the Distribution web page. Contact Melida Carpenter with questions.
- **School Dude-** Reminder that “Pick up” , “Delivery” & “Records Management” icons are only for Warehouse workorders.
- PPE questions and orders – email Ed Harper.
- Questions about distribution related items: email Brad Barker or Melida Carpenter.

PURCHASING REFRESH




Kristi Russell

IS A QUOTE REQUIRED?

- Quotes are required on ALL Federal Funds purchases.
- For all others, if there is a competitive bid in place, the quotes are included in that bid, and no quote form will need to be attached.
- If there is no competitive bid in place, quotes **ARE** required. If quotes are not attached, the requisition will be denied.
- Quotes may be obtained from phone calls to approved vendors, vendor catalogs, vendor websites or an online search. This documentation must be kept, AND then...

IS A QUOTE REQUIRED?

- Complete the Quote Form (see Purchasing's webpage for NEW fillable form) and attach it to the requisition.



MISD
Mansfield Independent School District
PURCHASING DEPARTMENT
605 E Broad Street, Bldg. 300
MANSFIELD, TX 76063
Phone 817-299-6090
Fax 817-473-8780

QUOTE GUIDELINES

ALL purchases will be made through approved vendors when available, regardless of price.

If an item is not on a current bid and the price is more than \$3500.00, three quotes must be obtained. (Phone, Online Website, Vendor Catalog, etc.) Attach screen shots for online quotes or copies of catalog pages for backup.

If the item can only be purchased from a non-approved vendor, you must document that at least two approved vendors were contacted. List all vendors contacted on the form, indicating that they did not have the product requested.

Indicate the requested vendor in the space provided. If vendor selected does not offer the lowest cost, a full explanation shall be provided. (For instance, a vendor may be chosen regardless of higher cost if time requirements are better or if additional products and/or services are offered.)

If an item is available from more than one approved vendor, it is recommended, that you get three quotes to obtain the best price.

Quote must be attached to Requisition in Skyward.

Federal Funds
 General Funds

QUOTE FORM							
All information requested must be completed. If vendor is not in Skyward, you must complete the necessary vendor paperwork. Attach additional sheets if necessary.							
<i>Include vendor name, contact and phone number.</i>		Vendor #1		Vendor #2		Vendor #3	
Item Description <small>Include catalog item #</small>	Qty	Unit Price	Ext Price	Unit Price	Ext Price	Unit Price	Ext Price
Freight <small>(Total shipping and handling charges)</small>							
TOTAL COST							
<i>List the vendor you prefer to use; give an explanation if not using the lowest price quoted.</i>							

CAMPUS/DEPARTMENT _____

PRINT NAME _____ EMAIL _____

PHONE _____ FAX _____ DATE _____

CONTRACTED SERVICES

- When doing business with any author or individual that provides a service for a fee, a Contracted Services Agreement must be completed along with a Contract Approval Form for the appropriate dollar amount (< \$50K and >\$50K). All of these forms are available on the Business Services webpage.
- The contractor will need to supply a current W9. If the vendor is not in Skyward, contact Purchasing to discuss.
- A purchase order must be created **BEFORE** the service occurs, and vendors must provide their own invoice **AFTER** the service occurs.

CONTRACTED SERVICES AGREEMENT

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MANSFIELD INDEPENDENT SCHOOL DISTRICT CONTRACTED SERVICES AGREEMENT

The Mansfield Independent School District, hereinafter referred to as "District," and independent contractor _____, hereinafter referred to as "Consultant," enter into a contract for the provision of services.

1. District agrees to engage Consultant, and Consultant agrees to perform personally, in a manner satisfactory to District, the services as described in Addendum A. All dates, time, and locations shall be stated therein.

2. District agrees to pay Consultant a fee as per Addendum B compensation for services rendered. Unless specifically agreed to in writing, expenses for transportation, lodging, meals, and materials are incurred by the consultant. All reimbursements for expenses, which are agreed to in writing, associated with consultant services shall be made in accordance with the MISD TRAVEL EXPENSE GUIDELINES FOR CONSULTANT SERVICES.

Consultant shall not be paid in advance. All fees shall be paid after the activity is completed and required documentation, including invoice, is turned in to the Business Office. It is the intent of the school district to pay all invoices as promptly as possible; however, by acceptance of a district purchase order you have agreed to the 45 day payment policy. All invoices are submitted to the Accounts Payable Department.

3. This agreement shall be in effect according to the approved request for proposal unless terminated by either party at any time, with or without cause. In the event of termination by District or Consultant prior to completion of the contract, compensation shall be prorated on the basis of hours actually worked, services actually provided, or materials actually provided, and Consultant shall only be entitled to receive just and equitable compensation for any satisfactory work completed and expenses incurred up to the date of termination.

District may terminate this contract if funds sufficient to pay obligations hereunder are not appropriated by the MISD Board of Trustees. In the event of non-appropriation, Vendor will be provided ten (10) days written notice of intent to terminate.

4. Consultant may not assign this contract to a third party without the written consent of the District. Consultant must complete the Contractor Certification form required by Texas Education Code Sec. 22.0834(d) and conduct a national criminal history record information review as required by Sec. 22.0834, at the Consultant's expense, of all employees employed under this contract, except District employees and current Texas State Certified teachers. No employee of Consultant with a disqualifying conviction shall be allowed by Consultant or District to perform services under the terms of this Agreement for District.

Consultant is not an employee of District, and is not entitled to fringe benefits, pension, workers compensation, retirement or unemployment compensation. District shall not obtain or maintain any insurance for or on behalf of Consultant. District shall not deduct Federal income taxes, FICA (Social Security), or any other taxes required to be deducted by an employer, as this is the

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responsibility of Consultant.

5. Consultant agrees to hold District harmless from any and all liability incurred by District by reason of Consultant's negligence or breach of contract, including, without limitation, damages of every kind and nature, out-of-pocket costs, and legal expenses.

5. a. (FERPA) As a Consultant retained by the District to perform services under this agreement, the Consultant shall be deemed a "school official" as that term defined in the District's Board Policy. Further, it is understood and agreed that in order to perform services hereunder, it may be necessary for the Consultant to preview and be provided access to the "educational records" (as defined in the Texas Education Code and the Family Education Rights and Privacy Act) of students of the District for whom the Consultant provides services hereafter. Consultant agrees to maintain the confidentiality of any and all educational records of students in the District that are disclosed to, or reviewed by, the Consultant in accordance with Federal and State laws, rules and regulations. Consultant hereby covenants that the confidential and proprietary information of the District and student will be protected. Consultant shall keep all such information confidential and shall not disclose such information except under order of a court competent jurisdiction. Consultant also understands that any work created by Consultant pursuant to this agreement shall be and remain the sole property of the District and Consultant hereby relinquishes all rights to any such work.

5. b. (HIPAA Compliance) The parties agree to comply with the applicable provisions of the Administrative Simplification section of the Health Insurance Portability and Accountability Act of 1996, as codified at 42 U.S.C. 1320d through d-8 ("HIPAA"), and the requirements of any regulations promulgated including without limitation the federal privacy regulations as contained in 45 CFR Part 164 (the "Federal Privacy Regulations") and the federal security standards as contained in 45 CFR Part 142 (the "Federal Security Regulations"). The parties agree not to use or further disclose any protected health information, as defined in 45 CFR 164.504, or individually identifiable health information, as defined in 42 U.S.C. 1320d (collectively, the "Protected Health Information"), concerning a patient other than as permitted by this Agreement and the requirements of HIPAA or regulations promulgated under HIPAA including without limitation the Federal Privacy Regulations and the Federal Security Regulations. The parties will implement appropriate safeguards to prevent the use or disclosure of a patient's Protected Health Information other than as provided for by this Agreement. Consultant will promptly report to District any use or disclosure of a patient's Protected Health Information not provided for by this Agreement or in violation of HIPAA, the Federal Privacy Regulations, or the Federal Security Regulations of which Consultant becomes aware. Consultant will make its internal practices, books, and records relating to the use and disclosure of a patient's Protected Health Information available to the Secretary of Health and Human Services to the extent required for determining compliance with the Federal Privacy Regulations and the Federal Security Regulations. Notwithstanding, the foregoing, no attorney-client, accountant-client, or other legal privilege shall be deemed waived by Consultant by virtue of this subparagraph.

This Agreement, including attachments hereto, all of which are incorporated herein by reference, constitutes the entire understanding and agreement of the parties, whether written or oral, with

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CONTRACTED SERVICES AGREEMENT

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respect to the subject matter hereof and supersedes all prior and contemporaneous agreements or understandings between the parties. Unless an agreement is made, in writing, that alters this page, any query brought forward questioning the order of precedence relating to any written agreements between the parties, this contract will supersede all others including any attachments.

6. **MEDIATION:** Either party to this Agreement may demand non-binding mediation of any claim, dispute, or other matter in contest between the parties and arising under, out of, or related to this Agreement. All such demands shall be in writing. In the case of claims by Consultant against the District, no such demand shall be made until the complaint procedure found in District's board policy GF(LOCAL) has been fully exhausted regarding the contested matter.

Unless waived by the District in writing, the following are conditions precedent to the institution of civil proceedings by the consultant against the District concerning a contested matter arising under, out of, or related to this Agreement: (1) full exhaustion of claims through the District's complaint procedure described in policy GF (LOCAL); and (2) a written demand by the consultant for mediation.

Following the full exhaustion of claims through the complaint procedure found in District's board policy GF (LOCAL) and upon receipt by District of consultant's written demand for mediation, District may, at its option, either proceed with non-binding mediation of the dispute, or provide written notice to the consultant of the District's decision to waive its right to compel such mediation.

If the District waives its right to compel mediation, then consultant is at liberty to pursue its civil remedies, if any. Mediation under this paragraph shall take place before a neutral third party, agreed to by the parties. If the parties cannot agree on the neutral party, each shall nominate a mediator, and the two mediators so nominated shall agree on a third party neutral. The mediation shall proceed before the neutral third party under rules mutually agreeable to the parties and the mediator. Each party will bear its own expenses of mediation. The cost of the third party neutral shall be borne equally by the parties. Failure of the mediator to resolve issues acceptable to all parties within 15 days of the mediation shall allow either party to pursue its civil remedies. Contractor and District agree that venue, in the event of a suit, is in state courts of Tarrant County, Texas.

7. Contractor shall procure and maintain all insurance specified by District prior to beginning performance under this Agreement, during the full term of this Agreement, and beyond the term of this Agreement if required by District. Copies of all policies and endorsements, as well as proof of insurance on a properly executed certificate of insurance shall be provided to District at least five (5) days prior to the beginning of service under this Agreement.

8. As required by Texas Education Code Sec. 44.034, any person or business entity entering into a contract with District must give advance notice to District if the person or owner of the entity has been convicted of a felony and such notice shall include a general description of the conduct resulting in the felony conviction. Failure to provide such notice or misrepresentation of the conduct resulting in the conviction shall constitute grounds for termination of the Agreement.

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9. Consultant and its subcontractors shall not discriminate against any employee or applicant for employment on the basis of race, religion, age, disability, national origin, or any other protected classification under federal or state law.

10. District is an exempt entity under the laws of the State of Texas and shall not be liable for payment or reimbursement of any taxes paid by Consultant which District is exempt from paying under state law.

11. The invalidity of any part or portion of this Agreement shall not invalidate, impair, or otherwise affect the validity, effect, or enforceability of any other remaining part or portion of the Agreement.

IN WITNESS WHEREOF, Mansfield Independent School District and Consultant have executed this contract, effective the date on which the last party to sign the agreement executes this agreement.

By: MANSFIELD ISD

By: CONSULTANT

Signature: _____ Signature: _____

(Print) _____ (Print) _____

Title: _____ Title: _____

Date: _____ Date: _____

(For contracts of \$50,000 or more)

Date of Board approval: _____

Term of Request for Proposal: Beginning _____ Ending _____

BID # _____

(For contracts \$49,999 or less)

Vendor # _____ (W-9 must be attached)

Term of Request for Proposal: Beginning _____ Ending _____

MISD Staff Contact Person: _____

Phone number: _____

Campus/Department: _____


Budget Account Code(s): _____

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CONTRACT REVIEW FORM

1. Please note whether it is a new or renewal
2. Complete amount and budget code.
3. Note if no funds will be spent


Mansfield Independent School District
CONTRACT REVIEW AND APPROVAL FORM LESS THAN \$50,000

EMPLOYEE INFORMATION:

Date: _____

Campus/Dept.: _____

Contract With: _____

Purpose of Contract: _____

Date Final Approval Needed By: _____

Please submit at least thirty days before need by date.

CHECK ALL THAT APPLY:

New Contract

Renewal

Contract requires the expenditure of \$ _____ from account code _____

Requisition Attached

No funds are involved in execution of contract

Technology Approval Email Attached (if contract involves any form of technology – ex. software, hardware)

Other _____

APPROVAL:

I have read and reviewed the proposed contract and the proposed contract correctly states the desired objectives and obligations.

Originator/Employee _____ Principal or Director _____

Procurement Process Confirmed: _____ Date: _____

Director of Purchasing _____

Required **ONLY** for contracts greater than \$5000: _____ Date: _____

Supervising Member of Executive Council _____

Comments: _____

*Route this completely signed form with the contract to the Business Office for review. If approved, the Business Office will forward the signed contract back to the campus or department secretary. Unless otherwise indicated, the campus or department is responsible for returning signed contract to the vendor.

Originator Signature

Principal / Director Signature

Purchasing Director's Signature

Executive Council Signature
(if required – more than \$5000.00)

CONTRACTED SERVICES

- The signature on a contract **CANNOT** be the Sponsor; it must be the employee who has designated signing authority – Principal, Director, etc..
- The contract review form must be completed for **ANY** contract – yearbook, pictures, etc. - not just contracted services.
- The contract and contract review form need to be submitted to Purchasing for approval at least 30 days before the event or before items are purchased.

MEALS FOR STAFF DEVELOPMENT

- Mansfield ISD permits meals twice a year for staff development / staff retreat.
 - DO make sure that meals are held on district property
 - DO make sure staff development / retreat has an agenda that details times and activities.
 - Professional development / retreat must be at least 6 hours to provide a meal.
 - DO make sure a sign-in sheet is completed to document employees' attendance.
- Meals may be scheduled for teacher / staff appreciation during the designated Appreciation Week (no agenda/sign in sheet is required).
- DO stay within the per diem meal amounts for overnight travel (this includes the supplies, drinks, serving, etc.).
 - Breakfast - \$13.00
 - Lunch - \$14.00
 - Dinner - \$23.00

MEAL EXCEPTIONS

- If a principal requires employees to stay on campus for an extended duty day that includes a meal period, such as Parent Conference Night, Meet the Teacher, or Registration, then a meal may be provided.
- DO provide something like a box lunch or pizza that is fairly inexpensive.
- It must be noted on the PO and staff must be required to attend.
- DO keep a copy of the email that the principal sends to staff / teachers requiring attendance.
- DO have a sign in sheet to document attendance.
- DO stay within per diem allowances.

REFRESHMENTS / LIGHT MEALS

- Refreshments can be provided for staff attending staff meetings; it is not required.
 - Tea, lemonade, water, cookies, brownies, popcorn
- Light meals for staff **AND** community members can be purchased for committee meetings such as school site base or school safety.
 - Tea, lemonade, water, sandwiches, chips, pizza, etc.
 - **DO** follow per diem amounts for overnight travel.

Remember- 6497 for food/drink and 6399 for any cups, plates or supplies.

PURCHASING DO'S & DON'TS



Cody Cannon

FEDERAL FUNDS - CONFLICT OF INTEREST

- **DO** have anyone that deals with Federal Funds complete a Conflict of Interest form **ONLY** if there is an **ACTUAL** conflict.
- This includes anyone who enters the requisition, approves the requisition, receives on the requisition or pays the vendor.

DO'S & DON'TS

- **DO** mark the deadlines to spend CAMPUS / DEPT budget funds on your calendar / email.
- **DO** order all office supplies from Staples unless you can demonstrate a significant savings from another vendor (quote form must be attached).
- **DO** always have a Purchase Order in place before buying anything.

DO'S & DON'TS

- **DON'T** reimburse unless for travel.
- **DON'T** host a book fair without a PO in place.
- **DON'T** have a fundraiser (shirts included) without a PO in place.
- **DON'T** just accept deliveries of items that are visibly damaged. Either refuse shipment if possible, or ensure the driver marks the item "Received Damaged" before signing. Then verify and begin a return process if necessary.

REQUISITION ETIQUETTE

- Length of Master Description-
 - When you start a requisition the Description box in that screen is called the Master Description. Please keep this as brief as possible. Just list information you need to recognize the order at a glance. Any other details should be entered as a Narrative line item.
- A contract MUST be selected.
 - Please make sure that you select a contract when starting your requisition. If there are multiple contracts look at the description to make sure you are choosing one that matches the goods/services you are ordering.
- Verify the contract listed on your quote matches the choice in Skyward.
 - If you received a quote from the vendor, look at it to see if they list a contract for pricing. If they do make sure to choose that contract when starting your requisition. If it is not an option, please reach out to Purchasing for assistance.

REQUISITION ETIQUETTE

Requisition Information

* Batch Number:

* Description:

Cooking supplies for a science project where students will learn the importance of molecules and chemistry stuff at a college level in accordance with TEA # 11254 which states students must learn how to make an omelet without breaking a few eggs. This needs to be processed ASAP since it's for something tomorrow and something else, just trying to get some extra words here. IMA FFE YMA YDA PPE Venti Grande Ok that's enough

* Vendor:

* Ship To:

Attention:

* Due Date:

Ship Date:

Ship Via:

Contract:

Requisition Number ▼	Status	A/D Level	Batch Number	Description	Vendor Name	Vnd St
▶ 0000271932	WIP	0	26	Supplies for Science event tomorrow	DELCOM GROUP LP	TX
▶ 0000271929	WIP	0	26	Cooking supplies for a science project where students will learn the importance of molecules and chemistry stuff at a college level in accordance with TEA # 11254 which states students must learn how to make an omelet without breaking a few eggs. This needs to be processed ASAP since it's for something tomorrow and something else, just trying to get some extra words here. IMA FFE YMA YDA PPE Venti Grande Ok that's enough	DELCOM GROUP LP	TX

REQUISITION ETIQUETTE

- **Item/catalog numbers**
 - Please enter any catalog or item numbers in the Catalog field. This makes it easier for the vendor to process your order since those numbers are separate from your Line-Item Description.
- **Enter narratives as Narrative Line-Items, not a Merchandise Line-Item**
 - Please enter any additional information as a Narrative Line-Item. When entered as a Merchandise Line-Item this can throw off the receiving record. It also will show up on various reports unnecessarily since it's entered as Merchandise.
- **Don't request invoices be sent to anyone other than AP**
 - ALL invoices need to go to the Accounts Payable account. If you need a copy for any reason, please request it from them. Requisitions asking for invoices to be sent to anyone other than AP may be edited to remove that line or denied.
- **If you reference a quote, attach a quote.**
 - Please attach any quotes you used to your requisition. If you reference a quote, make sure to attach it or else your requisition may be put on pending or denied.

REQUISITION ETIQUETTE

Before

Requisition Detail Line Items

Views: Filters:

Line ▲	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost
100		Catalog#657955AB Desktop computer stuff	1		29.99000	29.99
120		Quote#AAA1234 Send invoice to someoneotherthanAP@misdmail.org	0		0.00000	0.00

After

Requisition Detail Line Items

Views: Filters:

Line ▲	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost
100	657955AB	Desktop computer stuff	1		29.99000	29.99
110		Quote#AAA1234 Send invoice to accountspayable@misdmail.org	0		0.00000	0.00

REQUISITION ETIQUETTE

■ Federal/Amazon Quotes

- Please electronically fill out the quote form. Most handwritten forms slow down processing and result in follow up contact. Typed entries are just quicker and easier to view.
- Quotes should be for the exact same item (make/model). If this is not possible, your quote form must include a reason why.
- Please do not print your quotes and then scan them back onto your ocomputer. This also often makes it difficult to read and results in more phone calls/emails.
 - Utilize the 'Snipping Tool' built into Windows to make quick images of websites. If you need space than what it provides, 'print' the page as an Adobe PDF.

■ Combine documents

- Every staff member has access to an Adobe Creative Cloud license. Everyone here needs to have Adobe Pro DC installed on their workstation. This allows you to edit .pdfs as necessary.

■ Align/Orient Documents

- It does take a few extra clicks, but after combining your documents, take a moment to rotate them. We will sing your praises, and it will keep you from straining your neck when you refer to any of the documentation

REQUISITION ETIQUETTE

Individual

Attachments

Requisition Attachments

Available Attachments for Req Number 0000272274



Type ▲	Description	Entered By	Entered Date	Entered Time	File Size	
Quotes	Amazon Mouse.PNG	CODY W CANNON	07/28/2021	9:04 PM	491 KB	▲
Quotes	BestBuy Mouse.PNG	CODY W CANNON	07/28/2021	9:04 PM	431 KB	
Quotes	CDWG Mouse.PNG	CODY W CANNON	07/28/2021	9:04 PM	266 KB	
Quotes	FEDERAL FUNDS QUOTE FORM.xlsx	CODY W CANNON	07/28/2021	9:05 PM	107 KB	

Consolidated

Attachments

Requisition Attachments

Available Attachments for Req Number 0000272274



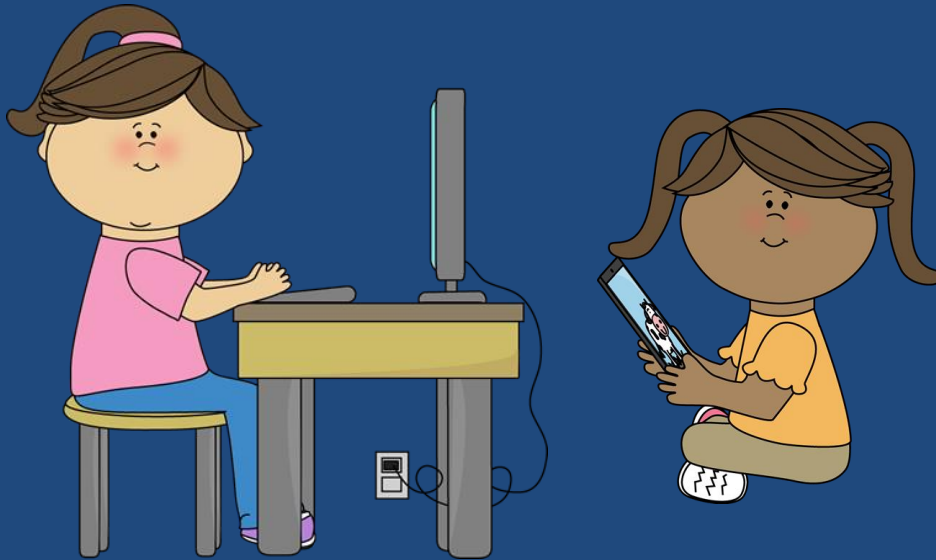
Type ▲	Description	Entered By	Entered Date	Entered Time	File Size	
Quotes	Federal- Wireless Mouse.pdf	CODY W CANNON	07/28/2021	9:06 PM	403 KB	▲

Wireless Mouse Example

DON'T FORGET...

- **The Purchasing OneNote and the Teams Purchasing Hub (under construction) are resources that can help answer your questions on common purchase vendors and pricing as well as access training materials.**

TECHNOLOGY PURCHASES



Cody Cannon



TECHNOLOGY RELATED

Product Shortages

- Between chip shortages and increased demand, a large percentage of Technology items are experiencing extended shipping delays.
- This is expected to persist throughout the school year.
- Please make Technology related purchases as early in the year as you can.
- We will likely have a Technology cut off BEFORE the standard PO cut off again this year.
- Where possible I will advertise expected delay times.

TECHNOLOGY RELATED

Adobe Creative Cloud

- The Technology Department is still covering the cost of all Adobe Creative Cloud subscriptions.
 - If you or an administrator currently have a subscription, you will not have to renew it. Technology is handling the transition. You shouldn't notice a change.
- Directions can be found in OneNote
 - Adobe CC Procedure OneNote ([Web view](#))

TECHNOLOGY PURCHASES

- Approved items are listed in OneNote by general categories.
 - Where possible prices will be listed.
 - Ecommerce items will not have pricing listed due to fluctuations. However, item and quote numbers will be available to make looking it up in Ecommerce as easy as possible.
 - Technology recommended accessories will be expanded in OneNote to include webcams, headsets, microphones and more.

TECHNOLOGY PURCHASES

- The vendors listed below will also automatically receive your approved POs, so you don't have to email them 😊

Global Asset	CDWG	Connection	Delcom	Apple	B&H	Cesco
Standard	Ecommerce	Ecommerce	Standard	Standard	Standard	Standard
Chromebooks	PC Accessories	PC Accessories	AV Installations	iPads	Cameras	Printers (1st)
Desktops	AV Accessories	Software	PC Accessories	MacBooks	Drones	
Laptops	Software			Apple Accessories	PC Accessories	
	Printers (2nd)				AV Accessories	

TECHNOLOGY PURCHASES

- Technology orders still require a Narrative stating the destination Campus/Department and End User.
- This is so the Technology Department can expedite the setup/delivery since they only see what is listed on the Purchase Order.
- Technology orders without this Narrative will be denied.

TECHNOLOGY PURCHASES

- The narrative will be listed in the OneNote so you can easily copy and paste it as needed.
- When using Ecommerce use the Ecommerce Narrative option to add this.

■ *****

■ Campus:

■ Recipient (first and last name):

■ *****

TECHNOLOGY PURCHASES

- Remember to use the OneNote!
 - It will be kept up to date with procedures and any relevant templates.
 - It is also a great resource for information on other common purchases (paper, batteries, catering, etc.)



WE ARE HERE TO HELP

- Reach out to us through email or Teams:

Cody – Technology, Furniture et will be kept up to date with procedures and any relevant templates.

- It is also a great resource for information on other common purchases (paper, batteries, catering, etc.)