

POLICIES AND PROCEDURES MEETING AGENDA

MARCH 31, 2023, 9:30AM VIA ZOOM

Topics of Discussion:

- 1. Purchasing: Toni Russo**
 - Updates: ED Data & Line Item Receiving
- 2. Human Resources: Scott Pepper and Julie Cangro**
 - Recording Substitutes
 - Timepiece- Full Time vs Hourly
- 3. Payroll: Hakim Brown**
 - Paper Paychecks
- 4. Transportation: Sergio Alfonso**
 - Student address changes
 - Bus passes
 - Field Trips
- 5. Family Information Center: Ilka Marino**
 - Start and End Enrollments in Infinite Campus
 - Student's First Day of Attendance
 - Ending Enrollments (New Address, Release)

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PURCHASING UPDATES

ED-DATA:

The Ed-Data supply system is now open for the 2023-2024 school year. Please have your teachers place their orders using Ed-Data prior to leaving this school year. If your teachers place their orders in June, they will be able to get their supplies as soon as they return in September. Remember that the supply chain is still “broken” and many vendors are no longer able to supply all the items that are needed. If they wait to place their orders, they will run the risk of not receiving them until end of year if at all.

Our first year utilizing Ed Data has produced a total district dollar saving of \$267,000.00 in a pricing comparison of National Cooperatives, State Contracts and Boces Contracts. This is approximately a savings of 48% over the above contract pricing.

2023-2024 Ed-Data Updates:

- 2023-2024 is opened for ordering. Once the budget has been approved and loaded into nVision, the orders will then be processed for the 23-24 school year
- There is a minimum order of \$35.00, per vendor order. If the cart is created using more than one vendor, each vendor order must be \$35.00 or more to be processed
- The vendor Cascade’s performance was below expectations and has been removed from the system. You will no longer be able to purchase using Cascade under “General Classroom Supplies”. Please use either “Office Supplies” or the “Teaching Aids” categories for classroom supplies. Some vendors in these categories are Staples, Good Stuff and Lakeshore
- **Free shipping ends as of September 30, 2023.** Any orders placed after this date will be charged a shipping fee regardless of what you are ordering. *NOTE: oversized items may have an additional shipping/freight charge added to the cart
- New contracts and updated pricing for all of ED Data’s vendors begins on December 1st. All requisitions need to be submitted, approved, and processed by purchasing to receive the prior contract pricing. Remember that not all items make it onto the new contract. So not processing your orders prior to the contract change runs the risk of higher prices and or not being able to purchase the items you need
- **November 1, 2023**, is the last day to submit supply orders on Ed Data. Approvers must approve all orders and submit to purchasing for conversion no later than **November 10, 2023**. Remember after this date you must submit a requisition via nVision for your supply orders
- All accounts can be updated for any changes and adds/deleting at anytime during the school year

- Training videos are available for all new users once they establish their accounts
- Contact representatives is Joann #973-321-9388 or joannl@ed-data.com
- Ed-Data review and best practices will be posted on Purchasing's website
- If not using Ed Data to purchase online, then a requisition must be placed in Vision

ED DATA IMPORTANT DATES:

June 23, 2023 – submit online orders

September 30, 2023- free shipping ends ***UNLESS OVERSIZED ITEMS

November 1, 2023 – final day to submit online orders

November 10, 2023 – final day to APPROVE online orders to PURCHASING for conversion

LINE ITEM RECEIVING:


Line Item Receiving is finally available on nVision. All requisitioners have been set up with this function. See example of the Received for PO attached. Please note that detailed instructions can be found on Purchasing's website under manuals and in the P & P meeting section after today's meeting.

You can access this function in nVision using the accounting module.

Instructions:

- Line Item Receiving
- Add New Record
- PO Number or Look up nVision defaults PO Date, Description, Vendor #, Vendor Name, Ship To & Contact and PO detailed line items
- Order # is a required field. Add if its on your packing slip, if not use date
- Date Received – order date received or default to today's date
- Received By – name of person who received the order
- Invoice Number
- Description of Order- department name and full or partial order should be indicated (complete should be noted once all items are received)
- Shipping Method – not needed
- Weight – not needed
- Number of Cartons – if applicable
- Fully Received PO – can be indicated and it will automatically populate the received items
- Partially Received PO – type in quantity received for each line item received, nVision will automatically calculate amounts. Tab to next line to add quantity received
- File Attachments- scan the packing slip showing received items onto nVision
- Save – record will be added to the Line Item Receiving Listing Window

Shipment Information

Received for P.O. #:	<input type="text" value="232002"/>		Order #:	<input type="text"/>	Date Received:	<input type="text" value="03/29/2023"/>	Reference #:	<input type="text" value="- New -"/>	
Received By:	<input type="text"/>			Invoice #:	<input type="text"/>			Shipping Method:	<input type="text"/>
Description:	<input type="text"/>						Weight (Lbs):	<input type="text"/>	
							Num Cartons:	<input type="text"/>	

Purchase Order Information

Date:	<input type="text" value="08/25/2022"/>	<input type="text" value="Badge Holders & Loops"/>	Ship To Building:	<input type="text" value="EDHS - TRANSPORTATION"/>
Vendor ID:	<input type="text" value="16096"/>	<input type="text" value="MYBINDING, LLC"/>	Ship To Contact:	<input type="text" value="SERGIO ALFONSO"/>

Purchase Order Details

Purchase Order Items Received [File Attachments](#)

					Purchase Order		Received	
Line #	Item Number	Description	UOM	Unit Price	Quantity	Extended Amt	Quantity	Extended Amt
▶ 1		White 6" Plastic Luggage...	EA	6.6900	30.00	200.70	< Enter >	0.00
2		Clear Vinyl Badge Holder...	EA	40.0900	30.00	1,202.70	< Enter >	0.00