

Procedures and Policies Meeting

August 29, 2023, 2:30 via ZOOM

Agenda

Topics of Discussion:

1. Purchasing: Toni Russo
 - Purchasing Policy Updates
 - Amazon Punch Out Ordering in nVision
 - Boces Cross Contracts
 - Contracts under \$1,000.00
 - Sole Source Letters
 - Records Management- COPIES

2. Food Services: Dawn McGinn, Director
 - Food Services Website
 - New Application
 - Free Meals

3. Transportation: Sergio Alfonso & Marcy Moskowitz
 - Field Trip Form Updates and Process

4. Payroll: Hakim Brown
 - Payroll Calendar

TOPICS OF DISCUSSION:

Purchasing: Toni Russo

Purchasing Policy has been updated and will be adopted by BOE

- Small change on policy:
We are no longer allowed to use any National Cooperative Contracts without having them vetted by our attorneys. The Amazon contract and Home Depot contracts have been approved for use and the contract information is included on the preferred vendor list on purchasing's webpage. Moving forward you should only be using a NYS, BOCES, ED Data, or another school districts piggyback contracts and National Cooperative contracts that are lawyer approved.

Amazon Purchasing: I am pleased to let you know that we are now able to purchase Amazon supplies via nVision punchout ordering . This means when you are in nVision creating a requisition for Amazon, you will be able to go to the online button next to the vendor's name and you will be routed directly to Amazon to create a cart. Once the cart is complete you will then submit it, making sure that the delivery information is correct. Once submitted the cart will route directly into nVision creating the line-by-line items in your requisition. You will then complete your requisition and submit it for approval. Upon the conversion of the requisition into a purchase order the po will automatically download the order directly to Amazon's ordering queue. It will all be done electronically. The only time you will need an open po is in January, once purchasing has closed.

- I am including amazon purchasing instructions in today's handouts along with posting the information on my website.
- For those of you who use amazon, please call me so I can walk you through this purchasing option.

BOCES Cross Contract Agreements (COSERS): To expedite your BOCES Agreements, and track Cosers for payment, fill out, sign, and return the BOCES form along with your BOCES Agreement (See Attached). If the form is not filled out, signed, and returned with the Cross Contract, the paperwork will not be processed for signature. Once complete, send all forms to Lynn in the purchasing office. She will process all paperwork for signature and send the agreements to SWBOCES. The BOCES Cross Contract form is posted on my website and included in today's handout.

Contracts Under \$1,000.00: We are in the process of creating a contract for service providers to be used for services that cost \$1,000.00 or less. The same contract can be used for all "in house field trips", author visits, presentations, and performances. The insurance requirements will be different for each contract and will need to be added into the contract template. The template will be approximately 3 pages opposed to the 15-page document we are using now. Those of you who have people coming into your buildings for the above reasons, please call me and I will walk you through the contract requirements. As soon as the contract template is completed, it will be posted on my website.

Sole Source Letters: if you are purchasing using a sole source letter, please make sure that the letter is current, and that the vendor is actually providing you with sole source documentation and that the product is named within the letter.

Records Management- Copies: In addition to my Purchasing Supervisor duties, I am also the District's Records Management Officer. In my capacity of RMO, I purge, store, archive, and digitize the Districts' permanent records. What I would like to talk about today is that not every piece of paper you print out from your computer is a permanent record and needs to be kept. If for example, you print out a report from nVision, that report is not considered a permanent record and can be discarded after it is used. The permanent file is in nVision and will be stored and backed up by LHRIC. You do not need to keep the report for any longer than you need to and at any time you can recreate it if you need. I would suggest to you all that you invest in a good copy stamp for everyone in your office and stamp the printouts as a **"COPY"**. This will signify that you can throw out the report after you use it or at end of year when you are clearing out your files.