

# **SANTA FE INDEPENDENT SCHOOL DISTRICT**

## **Purchasing Procedures and Vendor Information**

### **FORWARD:**

This information has been compiled as a guide to acquaint vendors and suppliers with District purchasing policies and procedures.

Santa Fe Independent School District Purchasing is a part of the Business Department and responsible for the organization and administration of the purchasing/procurement functions for the District in accordance with the authority delegated by the Superintendent and Board of Trustees.

The primary function of Purchasing is to meet the product and service needs of the District by:

- 1) Obtaining the best product at the lowest cost to the taxpayer while complying with all federal, state and local laws as well as District policies and guidelines;
- 2) Achieving a reliable and timely delivery for the requesting school or department;
- 3) Promoting fair competition among bidders;
- 4) Insuring an equal opportunity for all vendors to secure District business;
- 5) Educating and informing all vendors about District rules, regulations and methodology for the basis of bid awards;
- 6) Constantly seeking to identify and implement strategies and techniques that will enhance the level of service and integrity.

As a support organization of the District charged with the acquisition of goods and services requested by instructional and administrative departments, purchasing will function in a manner consistent with applicable laws, School Board Policies, the Uniform Commercial Code and other sound business practices.

Purchasing shares with the Business Department, the responsibility of expending District funds in such a manner that will meet all requirements of the State, Federal and District procurement regulations and safeguard the public trust.

Effective purchasing is a cooperative venture between Purchasing, campuses and other departments within the district. The purpose of this manual is to provide guidelines and procedures of the procurement process for all District personnel. The procedures contained in this manual, are intended to comply with all applicable laws, policies and procedures. In the event of a conflict, the appropriate law or policy shall prevail.

### **GENERAL STANDARDS AND ETHICS:**

Ethics relating to conflicts of interest, financial interests in firms conducting business with the district, kickbacks, gratuities and improper use of a position or confidential information, are clearly communicated throughout the District.

Additionally, District personnel should be aware that under Texas Education Code, Chapter 44, Section 44.031, as well as other state or federal statutes regarding the expenditures of public funds, there are penalties for violations of purchasing processes which can include criminal prosecution and loss of employment opportunities.

There are certain common standards of ethics which govern the conduct of employees involved in the purchasing function. The fundamental standards for Santa Fe ISD purchasing processes are as follows:

- 1) It is a breach of ethics to attempt to realize personal gain through employment with a public school district by any conduct inconsistent with the proper discharge of the employee's duties.
- 2) It is a breach of ethics to attempt to influence any public employee of a district to breach the standards of ethical conduct set forth in this code.
- 3) It is a breach of ethics for an employee of a district to participate directly or indirectly in a purchase or procurement if the following applies:
  - a. The employee or any member of the employee's immediate family has a financial interest pertaining to the procurement;
  - b. A business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or

- c. Any other person, business or organization with whom the employee or any member of the employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.

## **INTEGRITY:**

Fairness and impartiality in all phases of the process are an essential part of any transaction in public purchasing. Dealings with vendors and peers must be open, honest and objective. When meeting with vendors, SFISD will have at least two representatives present.

Like all service functions, the objective of Purchasing is to provide quality service for the District's campuses and departments. The process cannot be both effective and self-serving; the two are incompatible.

## **PURCHASING CODE OF ETHICS:**

Endeavor to obtain the greatest value for every District dollar expended but conducting business in a manner consistent with exemplary business practices, district policies and legal status.

Give prompt and courteous reception to all District staff and legitimate business representatives.

Provide support to the District's campuses and departments charged with the responsibility of creating an educational environment of excellence.

Insure that all responsible bidders receive equal consideration and the assurance of unbiased judgment in determining whether their products meet the educational and/or operational needs of the District.

Always consider the interests of the District and the enhancement of its educational programs first.

Strive for a thorough knowledge and understanding of the District's equipment and supplies in order to assist in the "best value" evaluation for the products and services purchased.

Work to identify and implement strategies and techniques that will preserve the integrity of the department while enhancing the level of service provided by the department.

Never accept gifts or favors which might influence or be construed to influence the purchase of goods and services.

## **PURCHASING AUTHORITY:**

Santa Fe ISD Board Policy Manual lists the following under CH (LEGAL) and CH (LOCAL):

The Board may adopt rules and procedures for the acquisition of goods and services. *Texas Education Code 44.03J(d)* CH (LEGAL)

The Board may delegate its authority regarding an action authorized or required to be taken by the District by *Texas Education Code Chapter 44, Subchapter B*, to a designated person, representative or committee. CH (LEGAL)

The Board may not delegate the authority to act regarding an action authorized or required to be taken by the Board by *Texas Education Code Chapter 44, Subchapter B*. CH (LEGAL)

**The Board delegates to the Superintendent or designee the authority to make budgeted purchases for goods or services. However, any single, budgeted purchase of goods or services that costs \$25,000 or more, regardless of whether the goods or services are competitively purchased, shall require Board approval before a transaction may take place. CH (LOCAL)**

All purchase commitments shall be made by the Superintendent or designee on a properly drawn and issued purchase order, in accordance with administrative procedures. The following goods and services do not require purchase orders:

- Waste/water
- Electricity
- Internet/phone service
- Copier lease and per click amount

- Fuel
- Property insurance
- Auto and general liability insurance
- Galveston Central Appraisal District
- Legal fees
- Personnel salaries
- Purchases under \$500
- Bond/indebtedness payments

The Board shall assume responsibility for debts incurred in the name of the District so long as those debts are for purchases made in accordance with adopted Board policy and current administrative procedures. The Board shall not be responsible for debts incurred by persons or organizations not directly under Board control. **Persons making unauthorized purchases shall assume full responsibility for all such debts.**

### **PURCHASING LIMITS:**

Texas Education Code ,Chapter 44 defines the methods of procurement to be utilized by school districts based on the level of expenditure during a twelve month period. All expenditures are looked at in the aggregate, that is all locations in the District are considered as one unit.

There are different categories of purchases including personal property, services, construction and real property. Personal property is defined as including, but not limited to, any item or thing that can be moved from one location to another or is consumable and does not include real property such as land, buildings and repairs or renovations to buildings. Services can include both professional and non-professional services. Professional services are generally defined as those for which a special qualification or licensing is required.

In order to determine the level of expenditures, Purchasing has developed a grouping of commodity categories and sub-categories, based on those listed in the Texas Education Agency Financial Accountability System Resource Guide. These categories include, but are not limited to:

- Athletic Supplies
- Custodial
- Food Service
- Instructional - Capital Equipment
- Instructional Supplies
- Maintenance
- Transportation
- Bank Depository
- Printed Forms
- Nonprofessional Services
- Real Property
- Insurance

These commodities are grouped so that contracts for the purchases of these items can be awarded in a competitive process to assure the District is receiving best value for budgeted expenditures and are in compliance with all statutes, policies and procedures. A complete list of all commodity groupings can be found on the District website at [www.sfsd.org](http://www.sfsd.org) under the Business Department/Purchasing.

District transactions are monitored within Purchasing so that procurements can be grouped as needed and required under these guidelines. All procurements must be classified within a designated commodity code.

### **IMPERMISSIBLE PRACTICES:**

Texas Education Code Chapter 44, Section 44.032, prohibits the separate sequential or component purchases to avoid the purchasing limit requirements as set forth in this document. Violations of this or other provisions of the procurement statutes can result in criminal charges, removal from office, and/or termination of employment.

## **PERSONAL PURCHASES:**

District employees are prohibited from purchasing supplies or equipment for personal use with District funds. All items purchased with District funds are the property of the District. Violations could result in criminal charges and/or termination of employment.

## **TAX EXEMPT STATUS:**

The District is a political subdivision of the State of Texas and as such is exempt from State sales tax under Chapter 20, Title 122A, Revised Statutes of Texas.

Items or services purchased for which tax exemption status is claimed must be used within the performance of the District's business.

It is a criminal offense to utilize this tax exempt status for any other purpose.

## **SCHOOL DISTRICT PERSONAL PROPERTY PURCHASES UP TO \$50,000 IN AGGREGATE:**

Schools and departments are encouraged to use vendors currently under contract with the District for all procurements. **If the District does not have a current contract for the commodity or service needed, the following procedures apply.**

For purchases of personal property or services totaling less than \$25,000 in the aggregate for the fiscal year, schools and departments will be allowed to purchase using the best value criteria for the individual transaction, with the following guidelines:

- 1) Purchases up to \$500 *may* be made in the most expeditious manner possible, including the use of District P Cards, in order to meet the needs of the schools and departments. Although encouraged to utilize vendors within the system, new vendors may be added as needed.
- 2) Purchases of \$501 to \$2,499, campuses and departments must include a written quotation with the requisition. Although encouraged to utilize vendors within the system, new vendors may be added as needed.
- 3) Purchases \$2,500 to \$24,999, three written quotes are required. The requisition will not be processed until written documentation of the quotes has been provided. Purchasing maintains lists of vendors who have expressed interest in doing business with the District. Please seek assistance from Purchasing in obtaining information on potential vendors.
- 4) Purchases over \$25,000 require Board approval. Three written quotes are required.
- 5) For any purchase over \$50,000, a formal competitive procedure of procurement must be followed. Purchasing will assist campus and department personnel in following the statute requirements for competitive procurements and in preparing contract recommendations for Board consideration.

Failure to follow these guidelines could result in a delay of processing the request. For assistance in this process or obtaining quotes, please contact Amy Presley, Purchasing Specialist, at [Amy.Presley@sfsisd.org](mailto:Amy.Presley@sfsisd.org).

## **SCHOOL DISTRICT PURCHASES OF PERSONAL PROPERTY OR SERVICES VALUED AT \$50,000 OR MORE IN THE AGGREGATE:**

As directed in Texas Education Code Chapter 44, Section 44.031, Purchasing Contracts. (a) *Except as provided by this subchapter, all school district contracts, except contracts for the purchase of produce or vehicle fuel, valued at \$50,000 or more in the aggregate for each 12-month period shall be made by the method, of the following methods, that provide the best value for the district:*

- 1) Competitive bidding
- 2) Competitive sealed proposals
- 3) Request for proposals
- 4) An interlocal contract
- 5) A method provided by Chapter 2269, Government Code for construction services
- 6) Reverse auction
- 7) Political subdivision

An example is each campus orders t-shirts, it may not be \$50,000 in one purchase, but other campuses are ordering t shirts which put that commodity over the purchasing threshold and only approved vendors should be used,

## **EXCEPTIONS TO COMPETITIVE PROCUREMENT REQUIREMENTS:**

**Produce or Fuel** - There is an exception for produce and fuel that allows the District to use any method listed previously or those in Texas Education Code Chapter 44, Section 44.034.

**Cooperative Purchase Programs** - All items and services available through a Board approved cooperative have satisfied all procurement regulations for competitive procurement. No further bidding prior to purchase is required.

**Professional Services** -An additional exception applies to professional services as defined under Government Code, Chapter 2254, Subchapter A, Section 2254.003. Contracts for professional services may not be awarded on the basis of competitive bids.

**Sole Source Exception** - As allowed under Texas Education Code Chapter 44, Section 44.031, the District is allowed to purchase items available from a single source without complying with the competitive procurement provisions. Sole Source items are defined as follows:

- 1) an item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly;
- 2) a film, manuscript, or book;
- 3) a utility service, including electricity, gas, or water; and
- 4) a captive replacement part or component for equipment.

These exceptions do not apply to mainframe data processing equipment and peripheral attachments with a single item purchase price of \$15,000 or more.

Vendors claiming sole source status will be required to complete a Confirmation of Sole Source Compliance by Vendor form which can be found on the District website. Without properly completed documentation, this exception may not be considered.

**Emergency Damage or Destruction** - If school equipment, a school facility, or a portion of a school facility is destroyed, severely damaged, or experiences a major unforeseen operational or structural failure, and the Board determines that the delay posed by the contract methods required by this section would prevent or substantially impair the conduct of classes or other essential school activities, then contracts for the replacement or repair of the equipment, school facility, or portion of the school facility may be made by a method other than the methods required by this section.

**School Bus Purchases** - Each contract proposed to be made by a school district for the purchase or lease of one or more school buses, including a lease with an option to purchase, must be submitted to competitive bidding when the contract is valued at \$20,000 or more.

**Leases and Rentals** - Any leases or rentals of personal property or services are subject to the procurement procedures outlined in this document. An exception may be made for lease of real property where sole source limitations might apply due to location or building requirements.

However, it is mandatory that any contracts for such transactions contain the time period for the contract, stating both the beginning and ending date. If the ending date extends past the current fiscal year ending date, a cancellation clause must be contained in the contract allowing cancellation for non-appropriation as listed in Local Government Code Chapter 271, Section 271.903.

## **CONTRACT TIME PERIOD:**

As previously stated, the District may only use funds appropriated by the Board in the approved budgets. Therefore, no employee has the authority to commit funds in future budgets. While contracts may be issued for any time period as agreed to by the District and vendor, if the contract extends beyond the end of the current fiscal year, it must contain a cancellation clause as defined by Local Government Code, Subchapter A, Section 271.903. This clause permits the District to cancel, without penalty, any contract for which the Board does not allocate funding in the sequential year's budget. If a competitive procurement process is utilized such as a Request for Bid or Request for Proposal, the contract time period must be clearly defined.

## **BID PROCESS:**

If it is determined that the personal property or service needed will require either a Request for Bids or Request for Proposals process on the open market, Purchasing will prepare the bid documents. The requesting department will be responsible for providing specifications of the products or services needed. Specifications cannot be used that preclude competition in the marketplace on comparable items or services. The use of any brand name or manufacturer's reference should be descriptive, not restrictive, and should

merely indicate the type and quality of the items desired. Detailed specifications are requested but at the least, all specifications should include the minimum acceptable requirements or features. Alternate bids may be considered for award if in the best interest of the District.

Upon conclusion of the bidding process, the bid will be opened in the Business Department. The requesting department will be responsible for tabulating, evaluating, scoring the results and providing a written recommendation to the Business Department for award. The Business Department will review and prepare the agenda item for Board approval and submit it for consideration. If approved and awarded by the Board, Purchasing will publicize the results on the District webpage along with notifying the vendors involved in the process.

In accordance with Texas Education Code, Chapter 44, Section 44.031, Notice of the time and place that bids or requests for qualifications are opened must be published once a week for at least two weeks prior to the deadline for receipt. The notice must include the date, time due and location of the bid or qualification request is to be opened. Such notices must be published in the county where the District's administrative office is located. Bids and proposals will be opened in a public meeting by the Business Department. All such openings are open to the general public or any interested party.

### **VENDOR INFORMATION:**

Santa Fe Independent School District continuously solicits prospective vendors for bids on categories of personal property as required by Section 44.031 of the Texas Education Code. The District has selected vendor qualification criteria that includes, but not limited to, the following:

- 1) the purchase price;
- 2) the reputation of the vendor and of the vendor's goods or services;
- 3) the quality of the vendor's goods or services;
- 4) the extent to which the goods or services meet the district's needs;
- 5) the vendor's past relationship with the district;
- 6) the impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses;
- 7) the total long-term cost to the district to acquire the vendor's goods or services;
- 8) any other relevant factor specifically listed in the request for bids or proposals.

The District shall not restrict vendor competition by requiring any of the following as selection criteria:

- Unreasonable requirements, such as excessive experience or bonding, brand name products or geographic preferences that would unduly restrict competition among qualified vendors
- Arbitrary restrictions that are not essential to the bid/proposal specifications

Any vendor wishing to do business with Santa Fe Independent School District may complete the vendor information, forms and email those forms along with detail describing the goods and services offered to [Purchasing@sfnisd.org](mailto:Purchasing@sfnisd.org).

### **COOPERATIVE PURCHASING CONTRACTS:**

To conserve and coordinate the use of public funds, a school district may enter into agreements for the cooperative purchase of goods and services between itself and other local governments or agencies (interlocal agreement).

Such contracts, if competitively bid by the cooperative administration, satisfy the requirement for competitive procurements listed under Texas Education Code, Chapter 44, Section 44.031.

Participation is allowed through the execution of an interlocal agreement between the Santa Fe I.S.D. Board of Trustees and the Cooperative Administrator(s). The District currently has active membership in a number of Purchasing Cooperatives. These include, but are not limited to the following:

Texas Department of Information Resources (DIR)

Region IV - (TCPN)

Region VIII - (TIPS/TAPS)

Region XIX - (Allied States Cooperative)

Region XX - (Pace Purchasing Cooperative)

Houston-Galveston Area Council – (HGAC)

Harris County Department of Education – (Choice Partner's Cooperative)

Purchasing Solutions Alliance – (PSA)

State of Texas Cooperative Purchasing Program – (Texas Smartbuy)

The Local Government Purchasing Agreement – (BUYBOARD)

Eandl

National Cooperative Purchasing Agreement (NCPA)

Central Texas Purchasing Alliance (CTPA)

EPIC6 (Educational Purchasing Interlocal Cooperative)

Purchases under these contracts can expedite the procurement process for departments and campuses.

## **PURCHASE ORDER PROCESS:**

The following information is the general and appropriate path a purchase order will follow:

- 1) Requisitions originating at the department or campus level will be entered by the Bookkeeper or Administrative Assistant.
- 2) Once the requisition has been entered, the Budget Manager will receive an email notification that the requisition is awaiting approval.
- 3) After the Budget Manager approves, the requisition will be verified for accuracy by the Purchasing Specialist and Accounting Manager, then final approval will be awarded by the Chief Financial Officer. A requisition does not become a purchase order without the final approval of the CFO.
- 4) Purchase orders, unless otherwise stated, will be processed for distribution by the Purchasing Specialist. The original copy of the purchase order will be emailed to the vendor. Any attachments that should be sent to the vendor with the original purchase order, must be scanned and attached to the order while still in requisition status.
- 5) Purchase order numbers may not be given to the vendor prior to the final approval stage of the purchase order. Any special circumstances for processing purchase orders after final approval, must be communicated to the Purchasing Specialist immediately via email, prior to the distribution process.
- 6) All purchase orders will be received in Skyward Finance either as the items are delivered or when the order has been delivered in its entirety.

## **INDEPENDENT CONTRACTORS:**

From time to time, departments and campuses contract with individuals or companies for certain services or programs. The term "independent contractor" is used in these instances to denote Non-District personnel performing such services or programs on District property or on behalf of the District. Depending on the value of the services or program to be provided, the award for such contracts may be subject to competitive procurement procedures. As soon as the requirement for the desired services or program is identified, the department or campus should contact the Business Department to determine the proper procurement procedure.

All independent contractors will be required to sign an Independent Contract Agreement and provide proof of insurance at the levels recommended by the District or a Bodily Injury and Property Damage Waiver. Additionally, Independent Contractors are required by statute to provide a Criminal History Certification by Independent Contractor/Subcontractor affidavit certifying that the statute requirements have been met and will be monitored by the Contractor.

**All contract agreements, Criminal History information and purchase orders related to the service must be completed in their entirety and on file in the Business Department prior to the date(s) that the contract agreement takes place. All questions regarding Independent Contracts should contact the Human Resources Department.**

## **REQUIRED BACKGROUND CHECKS FOR INDEPENDENT CONTRACTORS:**

Effective January 1, 2008, Texas Education Code Chapter 22, Subsection C, requires all service contractors to a school district in Texas to obtain criminal history record information regarding covered employees and to certify to a school district that they have done so. Covered employees with disqualifying convictions are prohibited from performing services at a school district. As defined by Texas Education Code Chapter 22, disqualifying convictions include any of the following, if at the time of the offense the victim was under 18 or enrolled in a public school:

- 1) A felony offense under Title 5, Texas Penal Code;
- 2) An offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure;
- 3) An equivalent offense under Federal Law or laws of another state.

Service contractors must obtain the criminal history record information on all new or existing employees who will have continuing duties relating to the contract and will have direct contact with students. Covered employees employed by a contractor before January 1, 2008, are subject to name-based criminal history reviews and contractors must obtain the criminal history record information as soon as practical. Covered employees employed by a contractor on or after January 1, 2008, are subject to fingerprint-based criminal history reviews and contractors must obtain the criminal history record information before or immediately after securing the services of the covered employees.

Contractors must contact the Texas Department of Public Safety (DPS) directly to establish an account to obtain criminal histories. The contractor must certify to the District that it has performed the required criminal history reviews.

### **INSURANCE REQUIREMENTS:**

State law requires that any contractor entering into a construction contract must certify in writing that each employee of the contractor employed on the public project is provided with worker's compensation insurance coverage. All certificates must be on file at the District before work commences. A copy of the insurance coverage shall also be attached to any purchases orders issued to the contractor.

Additionally, general liability and automobile coverage is required for any contractor performing services on District property. Insurance certificates listing Santa Fe ISD as an additional insured should be on file at the District before work commences.

Failure to produce proof of satisfactory insurance coverage will be a consideration for non-award or contract termination.

### **BONDING:**

In order to protect the District's investment in public work projects, the District will require performance or payment bonds as required under current State Law. State Law requires that the District require performance bonds for any public works projects \$100,000 or more in value, and requires payment bonds for any public works projects \$25,000 or more in value.

The District also has the right to request a bid bond. This is typically used for high value contracts with complex bidding processes. The vendor is required to provide a bond of 5% of the project value to guarantee their ability to contract with the District upon award.

Bonding requirements are outlined in Government Code, Chapter 2253, Section 2253.022.

### **CONFLICT OF INTEREST:**

Local Government Code, Chapter 176, Section 176.003, provides information regarding conflict of interest statements to be filed by vendors and certain school district employees. The statutes apply to the District's officers and elected officials. There are specific rules regarding what constitutes a conflict of interest in regards to business transactions or real property transactions.

For expenditures from federal funds, District employees should be aware that the rules regarding conflict of interest are more stringent than the State requirements. For federal fund expenditures, the rules state that neither an employee administering, directing or authorizing the expenditure, nor members of the employee's immediate family can have a financial interest in a vendor involved in the procurement transaction involving these funds.

### **CERTIFICATE OF INTERESTED PARTIES (Form 1295):**

Santa Fe ISD is required to comply with House Bill 1295, which amended the Texas Government Code by adding Section 2252.908, Disclosure of Interested Parties. Section 2252.908 prohibits Santa Fe ISD from entering into a contract resulting from this solicitation with a business entity unless the business entity submits a Disclosure of Interested Parties (Form 1295) to Santa Fe ISD at the time the business entity submits the signed contract/proposal. The Texas Ethics Commission has adopted rules requiring the business entity to file Form 1295 electronically with the Texas Ethics Commission.

**"Interested Party"** means a person:

- a) who has a controlling interest in a business entity with whom Santa Fe ISD contracts; or
- b) who actively participates in facilitating the contract or negotiating the terms of the contract, including a broker, intermediary, adviser or attorney for the business entity.

**"Business Entity"** means an entity recognized by law through which business is conducted, including a sole proprietorship, partnership, or corporation.



**As a 'business entity', all vendors must electronically complete, print, sign, notarize, and submit Form 1295 with their proposals even if no interested parties exist.**

Santa Fe ISD must acknowledge the receipt of the filed Form 1295 by notifying the Texas Ethics Commission of the receipt of the filed

Form 1295 no later than the 30<sup>th</sup> day after the date the contract binds all parties to the contract. After Santa Fe ISD acknowledges the

Form 1295, the Texas Ethics Commission will post the completed Form 1295 to its website within (7) seven business days after receiving notice from Santa Fe ISD.

### **EDUCATION DEPARTMENT GENERAL ADMINISTRATIVE REGULATIONS (EDGAR):**

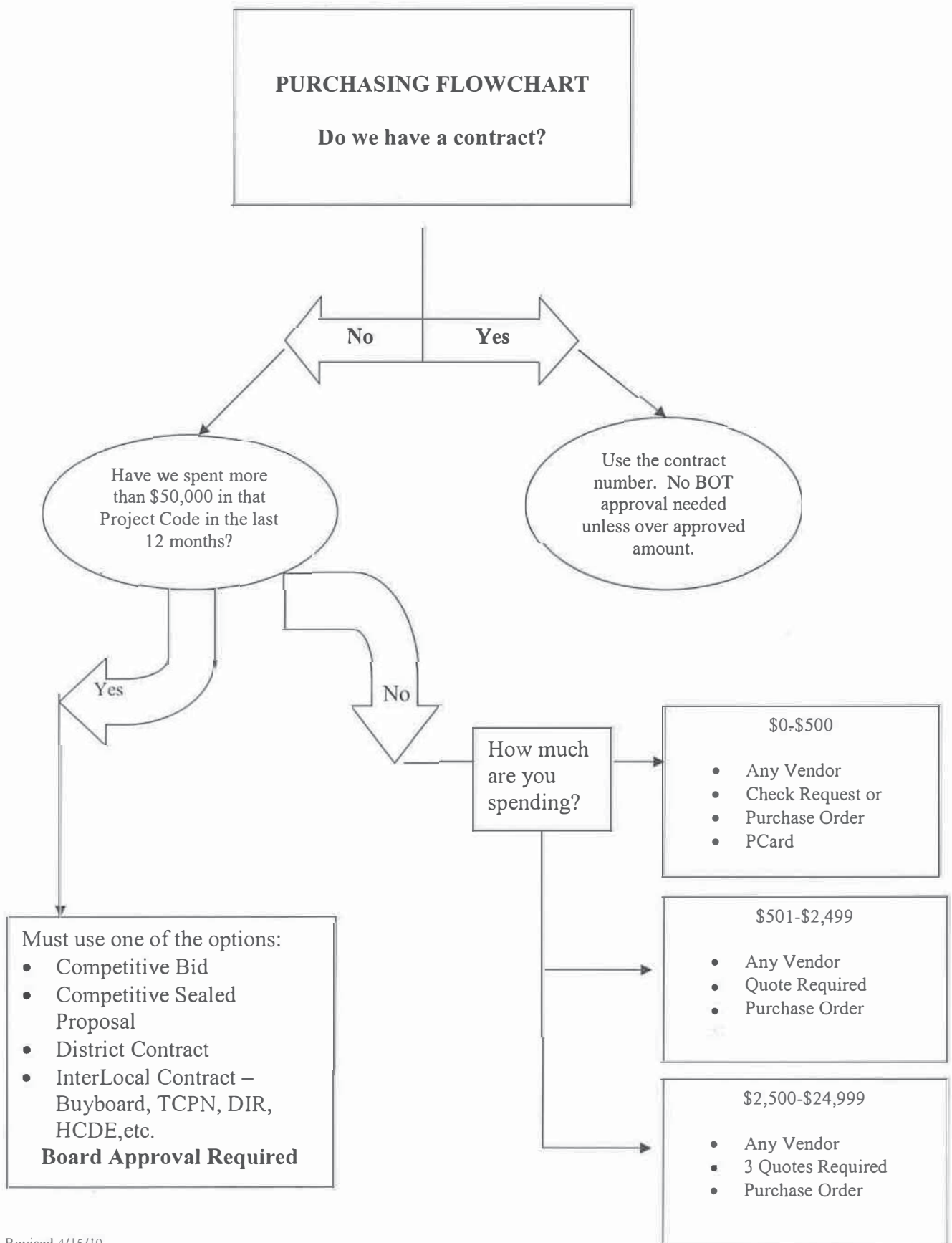
The new regulations from the Office of Management and Budget (OMB), codified as Title 2 of the Code of Federal Regulations (2 CFR) Part 200, were incorporated into general federal regulation on December 26, 2014. The new regulations govern all federal grants awarded by the US Department of Education (USDE) to the state or to an LEA on or after that date.

When the District seeks to procure goods and services using funds under a federal grant or contract, specific to federal laws and regulations, requirements may apply in addition to those under state law.

This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R., Part 200, (also referred to as the "Uniform Guidance" or new "EDGAR").

The District shall comply with all EDGAR federal regulations in the management of federal grant awards and state-administered grants, as designated by the TEA, except for the implementation of the procurement Standards. The District has opted to delay implementation of the 2CFR Part 200 Procurement Standards under the three-year grace period until July 1, 2018.

The District has determined that implementing the third year grace period until July 1, 2018, will provide an opportunity to continue to develop the District's written purchasing procedures as they relate to the Part 2 CFR 200 Procurement Standards.



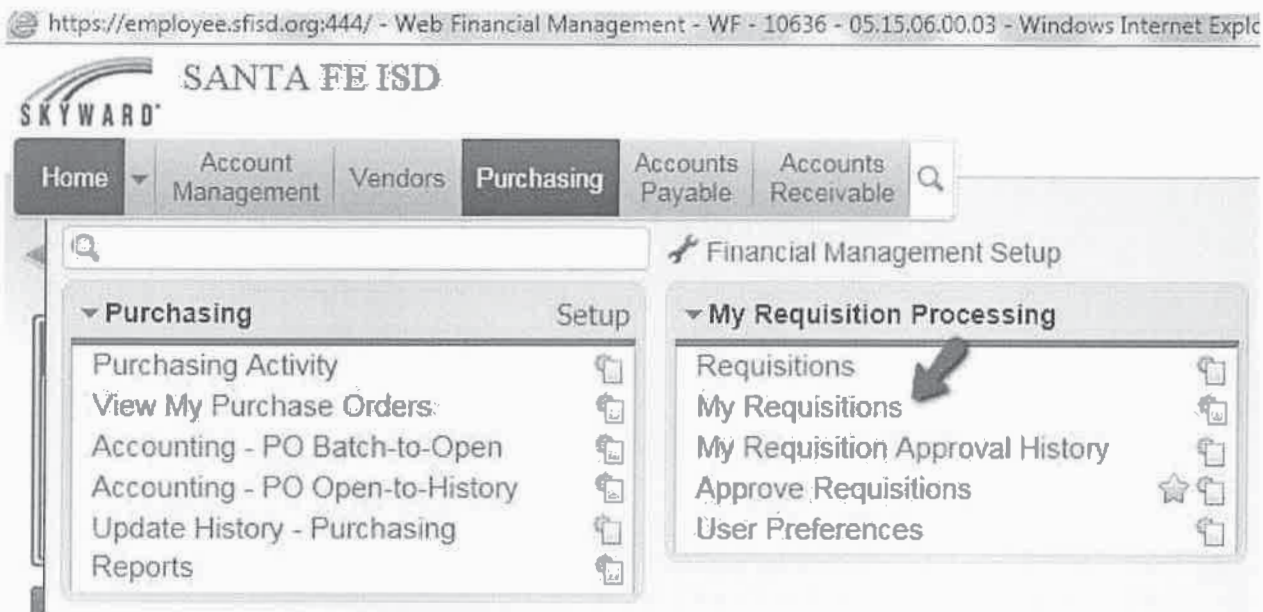
Revised 4/15/19

# ENTERING A PURCHASE ORDER IN SKYWARD

On the HOME screen in Skyward, click on Purchasing



Click on MY REQUISITIONS



The next screen will show your requisitions and the status

Click on Add to create a new requisition

https://employee.sfsd.org:444/ - My Requisitions - VFP UVMR 4Y 30360 - 05.15.06.00.03 - Windows Internet Explorer

**SANTA FE ISD** Donna Foise Account Preferences Exit ?

Home Account Management Vendors **Purchasing** Accounts Payable Accounts Receivable

**My Requisitions** Favorites New Window Print Queue

Views: General Filters: \*Skyward Default

PO Number	Requisition Number	App Sts	A/D Level	Batch Number	Description
0000000000	0000043580	WIP	0	DFOLSE	JR HIGH RTU INTERFACE
0000000000	0000043577	WIP	0	DFOLSE	BID ADVERTISEMENT
0000000000	0000043357	WIP	0	DFOLSE	OFFICE SUPPLIES

Print: Add View Edit Delete Clone Notes \*\*Attach Submit Add Expense Reimb Req Clone from Purchase Order Assign Special Group

And enter new information on the Requisition Master Information Screen:

https://employee.sfsd.org:444/?isPopup=true - Requisition Master Information - WF\PU\MR\RE\RQ - Internet Explorer

**Requisition Master Information**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

**Requisition Setup Information**

Requisition Group: 001 - HIGH SCHOOL  
 Fiscal Year: 2018 - 2019 July 1, 2018 - June 30, 2019  
☐ Account allocation by total requisition amount (YMA).  
☒ Account allocation by each requisition detail line (YDA).  
☐ This is a Blanket Requisition/Purchase Order.

**Requisition Information**

\* Batch Number: 15  
 \* Description: sample

\* Vendor: SCHOOL SPECIALTY 32656 COLLECTIONS CENTER DR CHICAGO IL 60  
 \* Ship To: SANTA FE ISD MAINTENANCE 4135 WARPATH AVE PO BOX 370 SANTA FE TX 7  
 Attention: AMY PRESLEY 409-925-9026  
 \* Due Date: 04/15/2019 Monday  
 Ship Date: 04/15/2019 Monday  
 Ship Via:  
 Project/Grant:  
 Contract: ILA/BBOARD - ILA/BUYBOARD

Save and Add Detail  
 Save and Mass Add Detail  
 Save and Import Detail Lines  
 Back

Asterisk (\*) denotes a required field

Create the requisition by entering information in each box:

Drop down to find your Requisition Group

Verify that the Fiscal Year is correct

*Choose the account allocation – Use either (YMA) or (YDA) for the 20/21 SY and for YMA you will allocate the full amount of the requisition to the account codes selected, for YDA each line item will need to be allocated by line item requisition amount. This option will be used and each line item has a different account allocation. The third option is a Blanket Requisition/Purchase Order and should only be used by Maintenance & Operations, Transportation and Child Nutrition.*

Create a batch number – this can be a default like mine: APRES or you can create a new batch for each day you enter requisitions. Once the order has been approved and is ready for distribution, the batch number is changed and then updated.

Description – *PLEASE USE ALL CAPS* This information appears on the monthly report for the Board of Trustees. It also prints out on the check stub for payment. This description needs to be as basic and to the point as possible. EX: Classroom Supplies, Office Supplies, Magazine Subscriptions, Library Books, Etc. Details per item or job should be described on the line item screen.

Vendor – Click on the word Vendor and the selection screen will appear. Near the bottom of the screen click on the Name: section and type in the first few letters of the Vendor you wish to create a requisition to. Hit the tab button and the vendors in the system beginning with those letters will appear. Highlight the vendor and hit the select button and the vendor will appear in this field.

Ship To – The Ship To default is Santa Fe ISD Maintenance. Unless you are creating a requisition for a Technology item, the delivery/ship to address will always be the Maintenance Department.

Attention – Enter your name and phone number in this line. If you are purchasing the items on the requisition for a specific department, or employee, you can reference their name in the field but only up to a certain amount of letters. If you have a long name, all the information may not fit. Keep it as short as possible. Your location is not necessary, name and phone number only are preferred.

Due Date – Automatically populates with the day the requisition is entered

Ship Date – This field should be blank. If the same date appears in this field as the Due Date, please delete.

Ship Via – leave blank

Project/Grant - *Select Commodity Code for purchase*

Contract – The district has inter local agreements to purchase goods and services through a contract between the entity and vendor. The district has ILA memberships with Region 4, Harris County Department of Education and the State of Texas Buyboard and DIR to name a few. The contract choices can be seen by dropping down using the arrow, then clicking on the contract choice for each individual requisition.

*Refer to Vendor List to find a vendor that is on a Purchasing Cooperative. If the vendor is not on this list and/or a current vendor they need to fill out new vendor forms. Enter Vendor to be approved and attach the entire packet to Skyward vendor file for review prior to approval.*

*Refer to vendor flow chart to determine vendor forms needed.*

## Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

## Requisition Master Information

## Requisition Setup Information

Requisition Group: 001 - HIGH SCHOOL

Fiscal Year: 2018 - 2019 July 1, 2018 - June 30, 2019

☐ Account allocation by total requisition amount (YMA).  
☒ Account allocation by each requisition detail line (YDA).  
☐ This is a Blanket Requisition/Purchase Order.

Save and Add Detail

Save and Mass Add Detail

Save and Import Detail Lines

Back

## Requisition Information

\* Batch Number: 15

\* Description: sample

\* Vendor: SCHOOL SPECIALTY 32656 COLLECTIONS CENTER DR CHICAGO IL 60

\* Ship To: SANTA FE ISD MAINTENANCE 4135 WARPATHE AVE PO BOX 370 SANTA FE TX 7

Attention: AMY PRESLEY 409-925-9026

\* Due Date: 04/15/2019 Monday

Ship Date: 04/15/2019 Monday

Ship Via:

Project/Grant:

Contract: ILA/BBOARD - ILA/BUYBOARD

Asterisk (\*) denotes a required field

Click on the Save and Add Detail button in the top right-hand corner and begin adding line items in the Requisition Detail Lines Section. *Click on Commodity Code: choose the commodity code from the list of drop downs (this will need to be done for each line item) TIP: you can search by typing Ctrl + F to find and appropriate code, then click on Save and then Add to continue adding line items.*

## Requisition Detail Lines/Accounting

Requisition Master Information

## Requisition Detail Lines

## Commodity Codes

Views: General Filters: \*Skyward Default

Commodity Code	Short Description	Long Description
29900	MAINT SERVICES	MAINT SERVICES
30000	Electronic Hard	Electronic Hardware
30005	MAINT CHEMICALS	MAINT CHEMICALS
30015	CLEANING/CUSTOD	CLEANING/CUSTODIAL
30020	COMM LAUNDRY SU	COMM LAUNDRY SUPPLIES
30025	CUSTODIAL EQUIP	CUSTODIAL EQUIPMENT
30030	ELECTRICAL MATE	ELECTRICAL MATERIALS
30035	FENCING MATERIA	FENCING MATERIALS
30040	FLOOR COVERING	FLOOR COVERING
30045	GENERAL BUILDIN	GENERAL BUILDING MAT AND SUPPL
30050	HVAC REFRIGERAT	HVAC REFRIGERATION MATERIALS
30055	HVAC SUPPLIES	HVAC SUPPLIES AND FILTERS
30060	LAMPS AND BULBS	LAMPS AND BULBS
30065	PAINT & PAINT S	PAINT & PAINT SUPPLIES
30070	PLUMBING MATERI	PLUMBING MATERIALS EQUIP/SUPPL
30075	WELDING EQUIP/S	WELDING EQUIP/SUPPLIES
30080	SAFETY SIGNS	SAFETY SIGNS
30900	MAINT EQUIP/SUP	MAINT EQUIP/SUPPLIES-OTHER
31005	OFFICE SUPPLIES	OFFICE SUPPLIES-GENERAL
31010	COPIER SUPPLIES	COPIER SUPPLIES
31015	PERIODICALS	PERIODICALS

Find: office suppl

☐ Match whole word only  
☐ Match case  
☒ Highlight all matches

Previous Next

500 382 records displayed

Commodity Code:

ABC



A line item of every purchase order must be information regarding the cost of shipping. If the order has been quoted without a shipping fee then the last line item should say in the description NO Shipping Per Vendor or Per Buyboard Contract, etc.

If the order has a shipping cost, then enter the shipping the same as a line item:

https://employee.sfsd.org:444/ - Requisition Detail Lines/Accounting - WF\PU\MR\MY - 30880 - 0 - Windows Internet Explorer

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

Batch Number: DFOLSE  
Requisition Number: 0000043594  
Group: (990) DISTRICT WIDE  
Fiscal Year: 2014 - 2015  
Vendor: OFFICE DEPOT INC  
ACCT #27983807 PO BOX 88040  
CHICAGO IL 60680-1040  
Project/Grant: OFFICE SUPPLIES-GENERAL  
Contract: ILA/BBOARD

Accounting: Account allocation by total requisition amount.  
Amount: 55.00  
Ship To: SANTA FE ISD MAINTENANCE  
Blanket PO: This is not a Blanket PO  
Description: OFFICE SUPPLIES

**Requisition Detail Lines**

\* Line Number: 110  
Line Type: ☒ Merchandise  
☐ Narrative  
Catalog:  
\* Quantity: 1  
Unit of Measure: ea  
\* Unit Cost: 5.00000  
Total Amount: 5.00  
\* Description: SHIPPING FEE

Save  
Back

Add Requisition Accounts: Each line item will need to be allocated, then Save Account Distrib

https://employee.sfsd.org:444/ - Account Distribution - WF\PU\MR\RE\RQ - 10740 - 05.19.02.00.0 - Internet Explorer

**Account Distribution**

Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Fc	Obj	So	Org	F	Pi	Loc	Funds Available	Selected
199	E	00	6146	00	000	0	00	904	\$0.00	<input type="checkbox"/>
199	E	00	8911	00	000	0	00	000	\$0.00	<input type="checkbox"/>
199	E	11	2153	00	001	0	11	006	\$669.37	<input checked="" type="checkbox"/>
199	E	11	2153	00	001	0	25	006	\$118.13	<input type="checkbox"/>
199	E	11	6112	00	001	0	11	001	\$-230.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	11	002	\$0.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	11	006	\$87.53	<input type="checkbox"/>
199	E	11	6112	00	001	0	11	009	\$-160.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	11	111	\$3.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	21	001	\$4,975.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	21	006	\$-11,729.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	22	006	\$-7,679.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	22	111	\$0.00	<input type="checkbox"/>
199	E	11	6112	00	001	0	23	001	\$-290.00	<input type="checkbox"/>

100 records displayed

Account Number:

Quick Key:

**Account Level Description**

Code	Description
199	GENERAL FUND
11	INSTRUCTION
2153	HEALTH & LIFE INS. PAYABLE
00	.
001	HIGH SCHOOL
0	FISCAL YEAR
11	BASIC ED
006	TEACHERS

Save Account Distrib  
Back

Total Amount to Distribute: \$89.90 100.00%  
Total Distributed: \$0.00 0.00%  
Amount Remaining: \$89.90 100.00%

**Selected Accounts**

Account Number	Amount	Percent
----------------	--------	---------

Remove  
Remove All

https://employee.sfsd.org:444/?MenuIDOverride=0&isPopup=true - Account Distribution - 05.15.06 - Windows Internet Explorer

### Account Distribution

**Available Accounts**

Fnd	T	Fc	Obj	So	Org	F	Pi	Loc
161	A	00	1101	00	000	0	00	000
161	L	00	2110	00	000	0	00	000
161	L	00	2310	00	000	0	00	000
161	Q	00	3600	00	000	0	00	000
161	Q	00	3602	00	000	0	00	000
161	E	11	6399	08	999	0	23	230
199	A	00	1101	00	000	0	00	000
199	A	00	1101	05	000	0	00	000
199	A	00	1102	00	000	0	00	000
199	A	00	1102	04	000	0	00	000
199	A	00	1103	01	000	0	00	000
199	A	00	1103	02	000	0	00	000
199	A	00	1107	00	000	0	00	000

100 records displayed

**Account Level Description**

**Account Number Information**

Code	Description
161	HURRICANE IKE
1101	CASH IN BANK
000	.
0	FISCAL YEAR
00	.

**2014-2015 Available Funds By**

Save Account Distrib

Back

Account Number:

Quick Key:

Total Amount to Distribute: \$60.00 100.00%

Total Distributed: \$0.00 0.00%

Amount Remaining: \$60.00 100.00%

**Selected Accounts**

Account Number	Amount	Percent
----------------	--------	---------

Remove

Remove All

There are several ways to look up account codes in Web. Clicking on the Account By Dimension button will bring up the Detail Account Selection Screen:

https://employee.sfsd.org:444/?hCurrentAccParams=Account%15browse%15PO%15A%15%15%15%15S&i...

### Account

**Detail Account Selection**

FUND: 199 GENERAL FUND

TYPE: E Expense

FUNCTION: 51 FACILITIES MAINT. & OPERATIONS

OBJECT: 6629 BLD CONST & IMP

SUB-OBJECT: 99 Reserve EOY

ORGANIZATN: 041 JUNIOR HIGH

FISCAL YR: 0 FISCAL YEAR

PROGRM-INT: 99 UNDISTRIBUTED PROGRAM

LOCAL: 097 EQUIPMENT

Account:

Quick Key:

Select

Back

Accounts

100%



https://employee.sfisd.org:444/ - Account Distribution - 05.15.06.00.03 - Windows Internet Explorer

### Account Distribution

**Available Accounts**

Fnd	T	Fc	Obj	So	Org	F	Pi	Loc
199	E	41	6117	00	750	0	99	120
199	E	41	6118	00	701	0	99	009
199	E	41	6118	00	750	0	99	009
199	E	41	6121	00	750	0	99	009
199	E	41	6121	00	750	0	99	016
199	E	41	6121	00	750	0	99	436
199	E	41	6121	00	901	0	99	000
199	E	41	6122	00	750	0	99	016
199	E	41	6122	00	750	0	99	017
199	E	41	6125	00	701	0	99	016
199	E	41	6125	00	703	0	99	016
199	E	41	6125	00	750	0	99	016

100 records displayed

**Account Level Description**

**Account Number Information**

Code	Description
199	GENERAL FUND
41	GENERAL ADMINISTRATION
6112	SUBS - TEACHERS & OTHER PROF
00	
750	ADMINISTRATION
0	FISCAL YEAR
99	UNDISTRIBUTED PROGRAM
017	SUBS - CLERICAL/TECHNICAL

**2014-2015 Available Funds By Individual Account**

\$

Account Number:

Quick Key:

Total Amount to Distribute: \$60.00 100.00%

Total Distributed: \$0.00 0.00%

Amount Remaining: \$60.00 100.00%

**Selected Accounts**

Account Number	Amount	Percent

Remove  
Remove All

Or enter the account code in the Account Number: window to bring up the code to assign to the line item.

https://employee.sfisd.org:444/ - Account Distribution - 05.15.06.00.03 - Windows Internet Explorer

### Account Distribution

**Available Accounts**

Fnd	T	Fc	Obj	So	Org	F	Pi	Loc
199	E	41	6117	00	750	0	99	120
199	E	41	6118	00	701	0	99	009
199	E	41	6118	00	750	0	99	009
199	E	41	6121	00	750	0	99	009
199	E	41	6121	00	750	0	99	016
199	E	41	6121	00	750	0	99	436
199	E	41	6121	00	901	0	99	000
199	E	41	6122	00	750	0	99	016
199	E	41	6122	00	750	0	99	017
199	E	41	6125	00	701	0	99	016
199	E	41	6125	00	703	0	99	016
199	E	41	6125	00	750	0	99	016

100 records displayed

**Account Level Description**

**Account Number Information**

Code	Description
199	GENERAL FUND
41	GENERAL ADMINISTRATION
6122	SUBSTITUTES+ PARAPROFESSIONALS
00	
750	ADMINISTRATION
0	FISCAL YEAR
99	UNDISTRIBUTED PROGRAM
017	SUBS - CLERICAL/TECHNICAL

**2014-2015 Available Funds By Individual Account**

\$

Account Number:

Quick Key:

Total Amount to Distribute: \$60.00 100.00%

Total Distributed: \$60.00 100.00%

Amount Remaining: \$0.00 0.00%

**Selected Accounts**

Account Number	Amount	Percent
199 E 41 6122 00 750 0 99 017	60.00	100.00

Remove  
Remove All

If you wish to use more than one account code, change the percentage or total amount for this account number, then add another account code for the balance. Then Save the Account Distribution by clicking on the button in the top right-hand corner. If more line items need to be added, go back to the Add on the requisition Detail Lines/Accounting Screen, which will be the default once hitting the save Account Distib button.

THE LAST LINE ITEM OF THE PURCHASE ORDER **MUST** INCLUDE THE CONTRACT #, WHEN RECEIVING QUOTES FROM VENDORS ASK FOR THE BEST COOPERATIVE PRICING AND ASK THAT THEY INCLUDE THE COOP AND CONTRACT NUMBER IN THE QUOTE.

CHOOSE LINE TYPE: NARRATIVE AND ENTER THIS INFORMATION IN THE DESCRIPTION

https://employee.sfsd.org:444/ - Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - Internet Explorer

### Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

#### Requisition Master Information

Batch Number: 15  
 Requisition Number: 0000051254  
 Group: (001) HIGH SCHOOL  
 Fiscal Year: 2018 - 2019  
 Vendor: SCHOOL SPECIALTY  
 32656 COLLECTIONS CENTER DR  
 CHICAGO IL 60693-0326  
 Contract: ILA/BBOARD

Accounting: Account allocation by each requisition detail line.  
 Amount: 114.90  
 Ship To: SANTA FE ISD MAINTENANCE  
 Blanket PO: This is not a Blanket PO  
 Description: sample

#### Requisition Detail Lines

\* Line Number: 120  
 Line Type: ☐ Merchandise ☒ Narrative  
 Narrative: [?] Save Back  
 Quantity: 0  
 Unit of Measure:  
 Unit Cost: 0.00000  
 Total Amount: 0.00  
 Description: BUYBOARD CONTRACT #502-17  
 Commodity Code:  
 Asterisk (\*) denotes a required field

Add attachments (quotes, proposals, etc.) At this point you are ready to Submit For Approval. If you are not ready to submit the requisition, you have the option to Save and Finish Later:

https://employee.sfsd.org:444/ - Requisition Detail Lines/Accounting - WF\PU\MR\RY - 30860 - 0 - Windows Internet Explorer

### Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

#### Requisition Master Information

Batch Number: DFOLSE  
 Requisition Number: 0000043594  
 Group: (990) DISTRICT WIDE  
 Fiscal Year: 2014 - 2015  
 Vendor: OFFICE DEPOT INC  
 ACCT #27983807 PO BOX  
 88040  
 CHICAGO IL 60680-1040  
 Project/Grant: OFFICE SUPPLIES-GENERAL  
 Contract: ILA/BBOARD

Accounting: Account allocation by total requisition amount. Edr Master  
 Amount: 60.00  
 Ship To: SANTA FE ISD MAINTENANCE  
 Blanket PO: This is not a Blanket PO  
 Description: OFFICE SUPPLIES

Submit For Approval  
Save and Finish Later  
Back  
Notes  
Attachments

#### Requisition Accounts

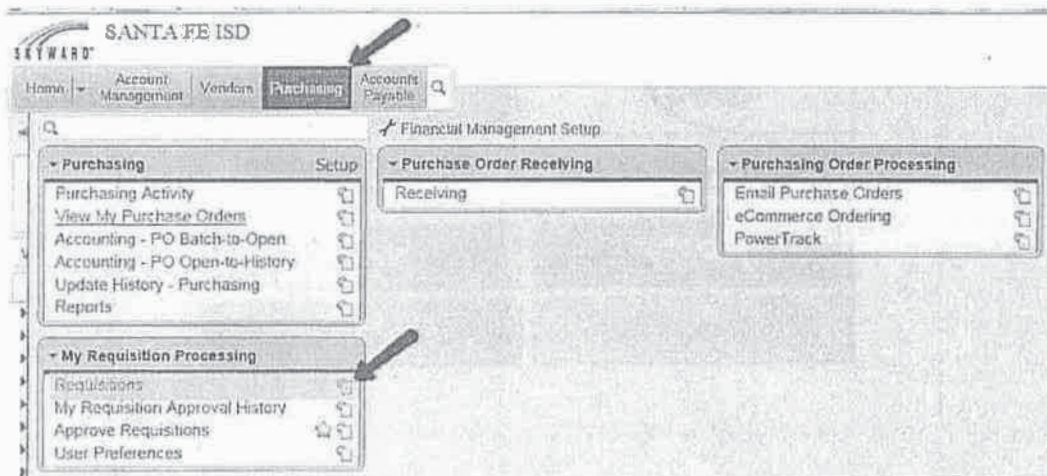
Requisition Accounting	Account Number	Ac
	199 E 41 6122 00 750 0 99 012	

Update Account Distrib  
View Requisition Detail Lines  
Add Asset Detail

Once the requisition has been submitted, the Budget Manager will approve the purchase, the requisition will be reviewed for accuracy then submitted for final approval by the Chief Financial Officer. Once the CFO approves, the requisition is printed, processed and updated to Open PO Status.

# E-COMMERCE PURCHASING

- Skyward Web Financial Management
  - Purchasing
  - Requisitions



- Add from Online Catalogue



- Select Vendor
  - In this example we used Frey Scientific



- Enter PO information as normal
- Click Save and Add Detail

https://employee.sfsd.org:444/ - Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05 - Internet Explorer

### Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

#### Requisition Master Information

**Requisition Setup Information**

Requisition Group: 001 - HIGH SCHOOL

Fiscal Year: 2018 - 2019 July 1, 2018 - June 30, 2019

☒ Account allocation by total requisition amount (YMA).  
☐ Account allocation by each requisition detail line (YDA).

Save and Add Detail  
Back

**Requisition Information**

\* Batch Number: 15

\* Description: 8TH GRADE SCIENTIFIC EQUIPMENT/SUPPLIES

Vendor: FREY SCIENTIFIC **\*\*Ecommerce Vendor\*\***

\* Ship To: SANTA FE ISD MAINTENANCE 4135 WARPATH AVE PO BOX 370 SANTA FE TX 71

Attention: AMY PRESLEY

\* Due Date: 04/15/2019 Monday

Ship Date: 04/15/2019 Monday

Ship Via:

Project/Grant:

Contract: ILA/HCDE - ILA/HCDE-CHOICE PARTNERS

Asterisk (\*) denotes a required field



- You will now be at the vendor website
  - This link is specific to SFISD and provides our discounted rate



- Add the items being purchased to the shopping cart
- Select Proceed to Checkout



- This will bring you to the review order screen

- Print this screen to attach to the PO
- Click Submit
  - This **DOES NOT** submit the order

1-800-425-3729 | Get Help

Welcome Santa Fe - Acct # 374380

**FREY**  
cposcience

PRODUCTS

3 My Account

Shop Our Products Lab Design Services Visit freyscientific.com Visit cposcience.com

**Review**

Shopping Cart Review Confirmation

Cart Number: 7170905684 Return to Previous Page | My Shopping List | Order By Item Number

Line	Ordered Item	Item Number	Description	Qty	UOM	Unit Price	Total Price
1	1321195	1321195	CHICKLE'S CYCLE EXPLORATION SET	1	EA	Net: \$48.89	Net: \$48.89
2	1440117	1440117	IGT MOMENT OF INERTIA	1	EA	Net: \$109.95	Net: \$109.95
3	1322514	1322514	MINI ECO	1	EA	Net: \$109.99	Net: \$109.99

Sub Total: \$168.83  
Shipping and Handling: \$32.00  
Sales Tax (2%): \$3.06  
Total: \$203.89

Return to Previous Page | My Shopping List | Order By Item Number

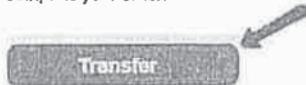
© 2015 Frey Scientific, Inc. All rights reserved.  
This use of Frey Scientific is subject to the provisions of the Frey Scientific User Agreement, Privacy Statement and Terms of Use Agreement.

- This particular vendor has an additional screen to complete the process – Each vendor site may vary a little
  - Click Transfer



**Thank You for Shopping With School Specialty!**

Your requisition is ready. Press the "Transfer" button below to transfer your requisition information to complete your order.



- You should now be back in Skyward and the information from the shopping cart will be listed on the PO being created
  - Click Add Requisition Accounts

- Enter/Select the account(s) needed for the PO
  - This is the same process as a normal PO
- Once the total has been allocated to the proper account code(s) click Save Account Distribution

- You can now attach the printout from the shopping cart
- Review the PO and edit if needed

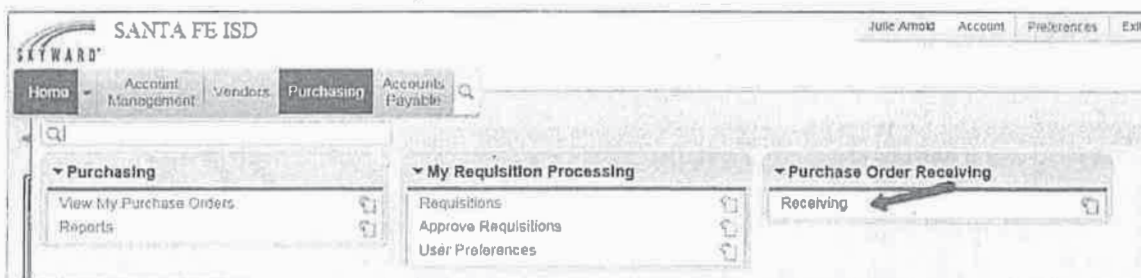
- [illegible]

- Click Add under Detail Lines/Accounting and this will bring you back to the website to make changes

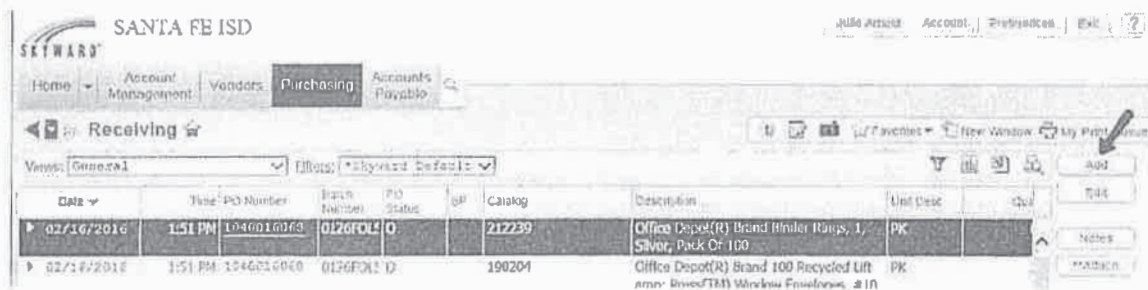


# PURCHASING RECEIVING

- Skyward Web Financial Management
  - Purchasing
  - Purchase Order Receiving
  - Receiving



- Click Add




- Enter PO Number
- Enter quantity received
  - Manually enter if partial receipt
  - Click receive all if everything has been received at once
- Attach a copy of the packing list
- Enter item comments if needed
  - Example: Item cancelled or discontinued
- Click Save

The screenshot shows the 'PO Line Items' window. At the top, there is a search bar with 'Enter PO Number' and a text input field containing '1040016097'. Below this are 'Search by PO' and 'Search by Vendor' buttons. A 'Views' dropdown is set to 'General', and a 'Filter' dropdown is set to 'Keyword Default'. The main table has columns: Line Number, Category, Description, U of M, Qty Ordered, Qty Received, Qty Received (manual), and Qty Remaining. Two rows are visible: Line 100 'TOOL TIME FOR EDUCATION CHOOSING AND' and Line 110 'SHIPPING CHARGE'. To the right of the table are buttons: 'Receive All', 'Receive As Qty Received is Zero', 'Show All Data Items', 'Notes', 'Attach', and 'Close'. Annotations with arrows point to specific elements: 'Manually enter if not all received' points to the 'Qty Received (manual)' column; 'Click here if all received at once' points to the 'Receive All' button; 'Enter item comments here. Example: Item Discontinued' points to the 'Notes' button; 'Attach packing list or back up documentation here.' points to the 'Attach' button; and 'Save' points to the 'Save' button at the top right.

- Repeat process for next PO receiving

Request for Delivery of Copy Paper

All requests for copy paper should be requested by each campus or department secretary or bookkeeper into Eduphoria as a Help Desk request, please allow 2-5 business days for delivery.



**Santa Fe**  
INDEPENDENT SCHOOL DISTRICT  
*Prepare, Achieve, Succeed*

[Home](#) [District Info](#) [Departments](#) [Community](#) [Parents](#) [Schools](#) [Students](#) **Staff** [Employment](#)

Home » [Staff Directory](#)

Staff Directory

A C D E L M O Q S T

A

- AESOP

C

- Canvas Login
- Citrix Portal
- Creative Explorers (Day Care)

D

- Destiny Library Catalog
- District Printer Installs

E

- Eduphoria

- Employee Access
- eSHARS
- eSTAR

L

- LifeWorks Employee Assistance Program

M

- MSDSonline

O

- Office 365 Apps & Webmail

Q

- Quicklinks for Employees

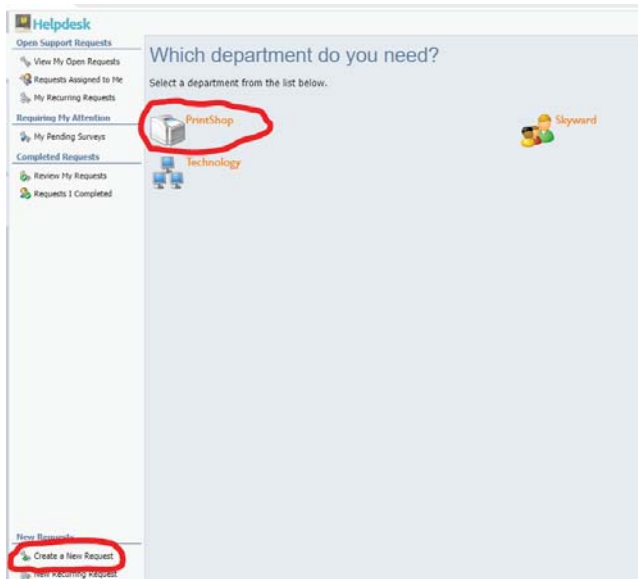
S

- S.O.A.R. Handbook and Application
- Safe Schools Compliance Training
- SchoolDude.com
- SFISD Employee Benefits Page
- Skyward Gradebook

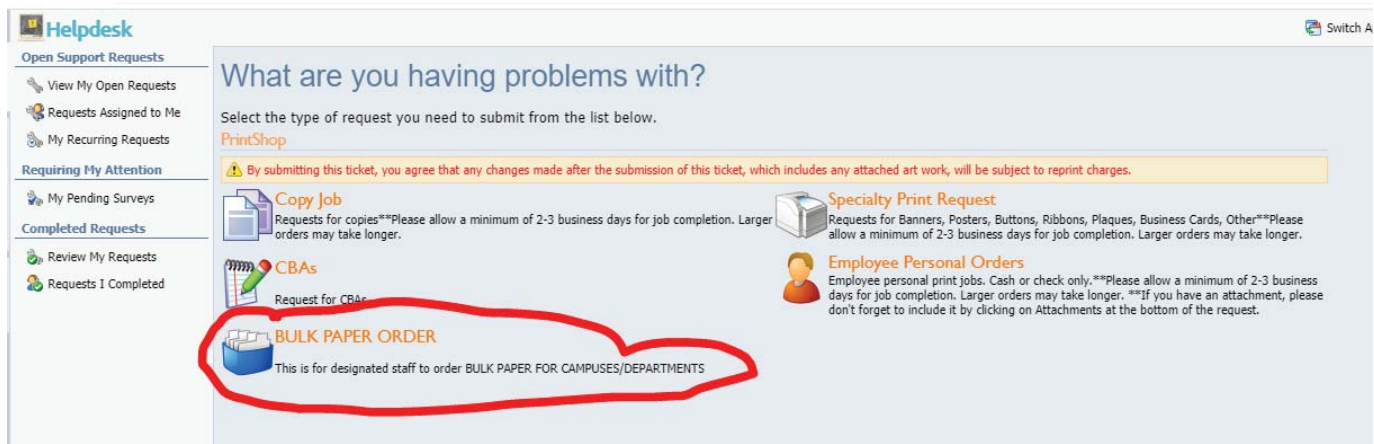
T

- TEKS Resource System
- Transfinder (Field Trip Secure Login)

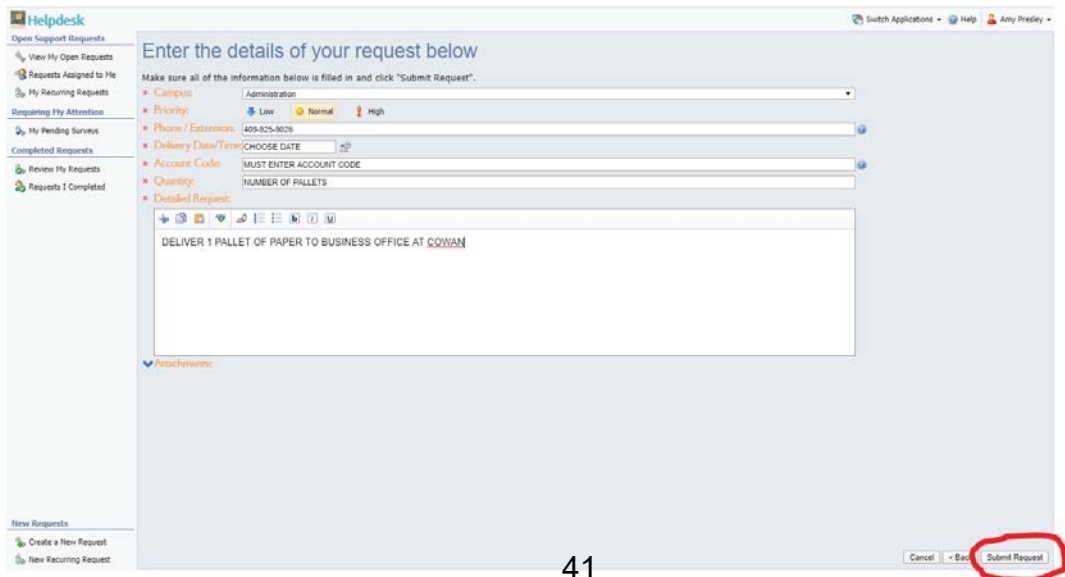
Create New Request at bottom left, then choose Print Shop

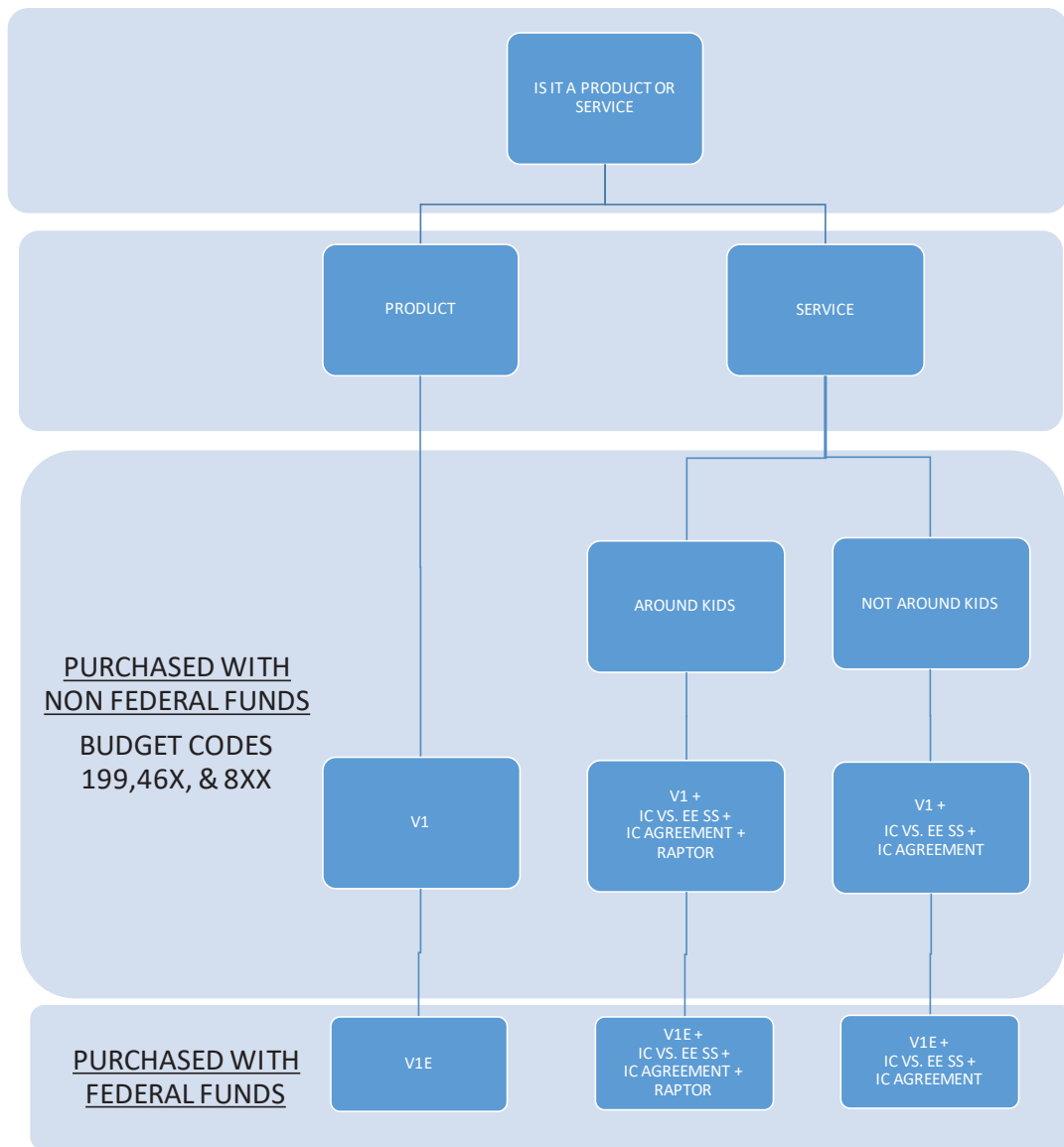


Choose BULK PAPER ORDER



Fill out the request using the example below, hit submit at the bottom right corner. Purchasing will request delivery through School Dude and updates will be posted along with the cost of the paper in the notes in the request.





**\* IF THE PURCHASE REQUIRES BOARD APPROVAL FORM 1295 WILL NEED TO BE FILED ELECTRONICALLY**