

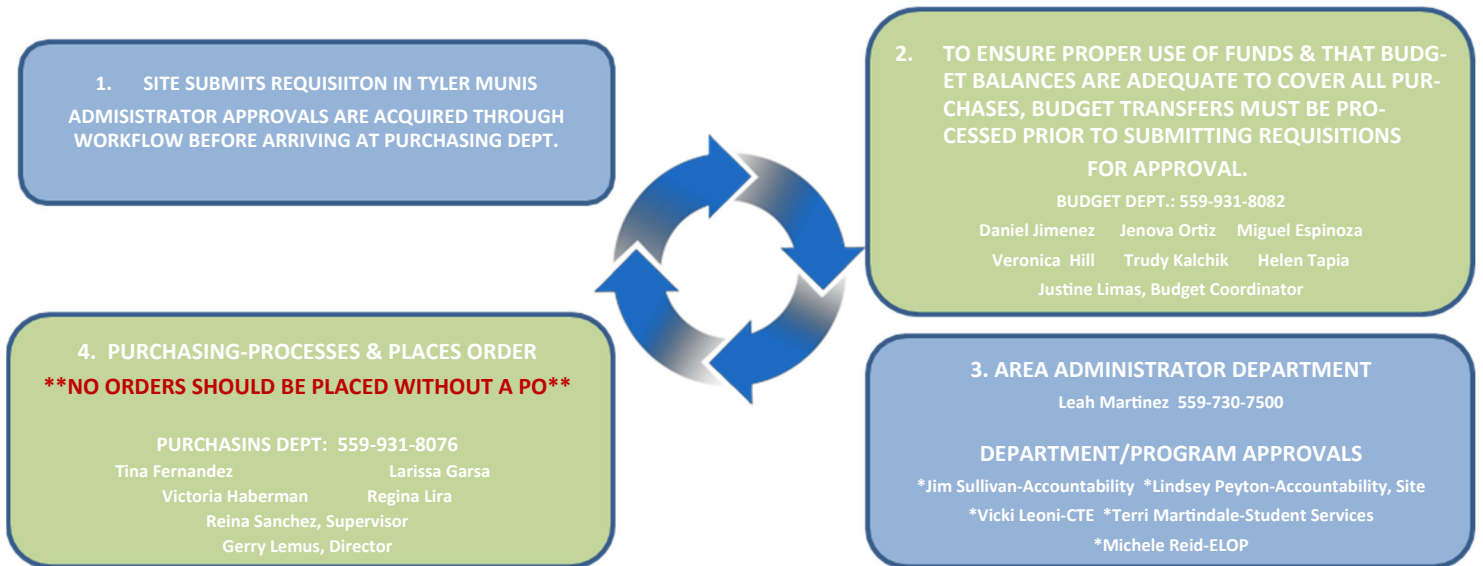
VISALIA UNIFIED PURCHASING DEPARTMENT

2024-2025

Purchasing Reminders

The Purchasing of services, equipment, and supplies shall be centralized in the Purchasing Department. Please remember the friendly purchasing staff is here to help and would be happy to answer any questions! We are familiar with the vendors typically used for most of your site needs. Don't waste time searching the web to find a vendor or get cheap prices - call us!

REQUISITION APPROVAL PROCESS



To avoid delays, please attach proper documentation:

Conference	Car Rental	Field Trip	Hotel
Flyer w/date & location	Car Rental Reservation	Flyer w/ date & Reservation	Hotel Confirmation Printout
Address to send PO/check	Conference flyer w/ date & location	Date of trip	Conference flyer indicating date/location
Conf. Attendance Copy	Conf. Attendance Copy	# of people attending	Conf. Attendance Copy

Other Reminders: *Verify Company accepts school purchase orders * Be sure to indicate vendor item numbers

*Attach meeting agenda with all catering invoices *Technology requisitions need IT Approval *Furniture must meet District Safety Standards

Open Purchase Orders:

1. Order for miscellaneous supplies shall not exceed \$1,000.00.
2. Orders not exceeding \$3,000.00 may be issued for Home Economic Supplies.
3. Orders not exceeding \$2,000.00 may be issued for Industrial Arts Departments.
4. Indicate all authorized signers for open PO's (first & last name).
5. Save Mart POs require the copy of PO and Save Mart credit card (not District or Administrator credit card) to make purchases.
6. Smart & Final only requires the copy of the PO to make purchases.
7. Receipts for miscellaneous items must be itemized and signed by the authorized employee picking up the materials. Please record the purchase order number on receipts and invoices before submitting to Accounts Payable Dept. for payment.
8. Equipment over \$500 (including tax & shipping) shall not be purchased on an open purchase order. Please submit a separate requisition.

****RECEIPT OF ITEMS FROM A VENDOR WITHOUT A PURCHASE ORDER IS PROHIBITED****

Ordering:

Only 1 vendor per order.

Office Depot/Amazon:

- * Approx. 1-2 day delivery
- * No shipping costs

Lakeshore Learning:

*** 15% Shipping Costs**

(Must include when ordering)

- * 2 week lead time

* *Certificates cannot be re-deemed through "Shop Online"- Requisition ONLY. Also, certificate amount cannot exceed the subtotal.*

Consultant Contracts:

- Consultant packets should be completed for anyone providing service at your site. For example: Bounce houses, DJ services, food trucks, author visits, trainings, etc. In an effort to streamline the process, Purchasing Dept. submitted contracts for the most commonly used vendors. If you would like to use a vendor that is not on the approved list, complete a consultant packet and submit for board approval. You may request an approved list of vendors from any of the purchasing team members.
- Any contract over \$1,000 requires Board approval.
- **Contact Kylie Mayes, HRD, for a Consultant Packages & Information**

Furniture Requests:

* Contact Purchasing Dept. for all furniture quotes.

*** When receiving items:**

1. Be sure to compare item # to the PO
2. Check for damage
3. Ensure all items were received
4. Notify Accounts Payable that items have been rec'd. Include PO number.

Fixed Assets:

*All asset tag forms are to be completed and returned with 10 days of receipt of product.

*Be sure to complete serial numbers.

*Notify Purchasing of any changes to location so that inventory records can be updated.

*Annually, an inventory report will be sent to your site to confirm property location.

*Disposal of non-capitalized equipment can only be done through the Purchasing Dept.

*Contact Purchasing Dept at 559-931-8076 with any questions.

Site/Facility Improvements:

Any construction or Public Works projects should be facilitated through the Facility Director, Steve Pena 559-931-8092 or Maintenance Director, Michael Doria 559-730-7589.

*Submit a Service Ticket to the Maintenance Dept. for any facility improvements and attach the signed/approved Fac. Mod. Form to any requisitions. Forms can be found on the VUSD website.

Reimbursements:

We understand that there are special circumstances that require us to use our personal funds, but we ask that an effort is made to reduce the number of occurrences or avoid it all together. As per our Purchasing policy, *"Purchases made in the name of the District without an authorized purchase order shall be considered an obligation of the person making the purchase and not an obligation of the District."*

Surplus Property:

***All disposal, removal or sale of property must be done through the Purchasing Dept.**

Purchasing works closely with the Grounds Dept. to remove or dispose of furniture. Submit a Service Ticket to Chris Ashford or Josh Bryan to schedule a pick up. Please include any asset tag #s.

Credit Cards:

The use of credit cards is meant for emergency use only or in cases that a PO is not accepted by the vendor. Every effort should be made to submit a requisition for all purchases. Also, due to inventory purposes, purchases of equipment or furniture over \$500.00 should not be made with credit card.

For questions:

*Purchasing Dept 559-931-8076: re: denied transactions, limit increase request, location/address changes, fraud, lost/stolen card, balance information, etc.

*Finance Dept 559-931-8074: re: statements and billing

***Please refer to our Credit Card policy found on VUSD website.**

Copier & Printer Procedures:

District Canon copiers are currently leased through Canon Financial Services and serviced by ABM. We contract with Zoom Imaging for printer maintenance and supplies (desktop laser jet printers-networked only).

Here are a couple of reminders before you process for payment:

1. Cost projections are sent in min-February with Budget Development packet. PO should be done for the annual cost by vendor for all devices at your site-not per invoice.
2. Invoices will come from Optimizon (our consultants who help manage all of our copy/print contracts). They review the invoices and make sure the prices match our contract before forwarding them to you. Please review them and make sure all the listed devices are at your sites and the charges are correct.
3. If you see any discrepancies with your invoices, please respond to the Optimizon representative who sent you the invoice or let Purchasing Dept. know.
4. If a PO has already been created, please do not submit another requisition. Simply forward the email to the AP Clerk and state "OK to pay against PO#XXXXX".
5. Forward your approval for payment to:
Finance Dept to accountspayable@vusd.org