

## MEMORANDUM

To: All Staff

From: Business Office

Date: June 2025

RE: 25-26 Budget & Purchasing Guidance

I am happy to re-introduce Susan Roberts (x2052) [sroberts@oriskanycsd.org](mailto:sroberts@oriskanycsd.org), our expert on all things related to requisitioning, purchasing, and payroll. New for the upcoming year is the [2025-26 Budget, Forms, & Guidance Folder](#), which contains all the necessary forms and guidance for the Business Office. The 2025-26 budget is now open and ready for requisitions. Please use the updated [Oriskany Requisition Form](#) when submitting your orders.

Below is the guidance for ordering, along with some important updates for the 2025-26 period. If you have any questions, please feel free to contact the Business Office.

**Electronic Ordering:** If you do not have an account, please contact Susan Roberts at [sroberts@oriskanycsd.org](mailto:sroberts@oriskanycsd.org).

**Amazon** - (Orders expire in 7 days) [Amazon Login](#) Please select free shipping if possible before submitting your order for approval. **PLEASE RELEASE YOUR CARTS BEFORE LEAVING AT THE END OF THE SCHOOL YEAR.** Orders will automatically be forwarded to your building administrator for approval. You will receive updates as your order moves through the approval process. If your order expires before processing, you will receive a notification and will need to resubmit your order.

**Staples** - [Staples Login](#) Orders do not expire and will be forwarded to building administration for approval. You will receive updates by email as your order moves through the system.

**\*\* Hummel's** - [Hummel's Login](#). There is a new website platform for Hummels and user account emails will be sent to you beginning on Monday, June 9, 2026. Please follow the directions to set up your accounts. Orders will need to be given to your building secretary for entry. All others will be able to view products and pricing. We have not been able to try the new system yet - so more guidance may be forthcoming.

**School Specialty** - [School Specialty Login](#)

**DCMO BOCES** - No ordering from DCMO for 2025-2026.

## **Purchasing Procedures**

All orders for goods and services must be approved and issued on a purchase order prior to obligating the school district to the expense. These procedures will ensure compliance with New York State Laws & Regulations, as well as Board of Education policies 4400 - General Procurement Standards, 4400.1 - Quotation Proposal Form, 4401 - Competitive Bidding, 4402 - Non-Bid Purchasing, 4404 - Expenditures of School District Funds.

1. **Requisition:** Requisitions must contain all necessary information for placing an order. Include company name, address, catalog number, color, accurate unit prices, a title and full description of items, delivery instructions, New York State Contract information, School District Bid information, and/or District Quote information. (Bid and quote information as outlined in BOE policy)
  - a. Additionally, when quoting an order, please attach all documents, including the vendor quote with shipping and tax removed, and send them to the School Business Executive/Purchasing Agent for final approval.
  - b. The building administrator must approve requisitions before they are submitted to the Business Office. Building Administrator will ensure the requisitions are coded to the correct budget code and that sufficient funding is available for the purchase(s).
  
2. **Prepaid Orders:** Normally, prepaid orders are not permitted. However, increasingly, vendors are requiring prepayment and/or a deposit for the purchase of goods and services.

**Procedures are Subject to Change**

- a. These orders are to be placed in the usual manner. Mark the requisition “PREPAYMENT REQUIRED” or “DEPOSIT REQUIRED” and be sure to attach documentation regarding the prepayment and/or deposit information.
  - b. Do not advance payments from your own personal funds and request reimbursement.
3. **Receipt of Goods:** After an order has been placed, the school or department will receive a copy of the purchase order for their records. Please retain this copy until you have received the merchandise. **IT IS ESSENTIAL TO SEND ACKNOWLEDGEMENT OF RECEIPT** to Susan Roberts, [sroberts@oriskanycsd.org](mailto:sroberts@oriskanycsd.org) so that payment can be made.
- a. Immediately upon receipt of the merchandise, check in the order and sign the packing slip(s) (in the event there is not a packing slip, please retrieve a copy of the purchase order and sign the copy), and return it to the Business Office for processing. This is very important as our Auditors review each purchase order to see that proper procedures are followed.
  - b. Please contact the Business Office if you have any issues with your order. Please do not call the vendor directly without first contacting the Business Office for further instructions.
4. **Conference Requests:** Once a conference request has received the appropriate levels of approval via MyLearningPlan and hardcopy Conference Request Form, the Business Office will issue a purchase order(s) to account for the expense and complete the registration process. Please ensure that all documentation related to conference registration and hotel accommodations (*if applicable*) is attached to the hard copy conference request form.

**5. Mileage Reimbursement:**

- a. All reimbursement for regular mileage allowance incurred as a result of assigned job positions must be submitted by staff to their immediate supervisor by June 25th of each year.
  - i. The immediate supervisor must verify (i.e. days off, snow days, holidays, etc.) that the information is true and accurate, and totals are checked before signing the voucher.
- b. All vouchers are then to be submitted to the Business Office for payment by June 30th. Please note: vouchers received late may not be honored for payment.

**6. Returns and Problems:** If you encounter a problem with your order, please contact the Business Office immediately. Do not contact the company or return items on your own.

- a. Please check your orders promptly upon receipt of merchandise. Most companies have time limits for notifying them of incorrect shipments, missing items, or damaged goods.

Any questions, please contact the Business Office. Forms can be found in the linked [Google Drive for 25-26 Budget, Forms, & Guidance Drive](#).