

## Purchasing Checklist

1. Approved vendor from:
  - a. [Internal List](#)
  - b. [Co-operative list](#)
  - c. Shared contract with another ISD
  
2. Quote must have:
  - a. Co-operative contract name and contract number (ex Buyboard #623-25).
  - b. Itemized list with pricing.
  - c. If it is an annual renewal of a subscription - the dates need to be on the quote (Ex. Annual renewal January 2026 - December 2026).
  - d. Quote must be current - if it has expired dates, it will be returned.
  - e. If using the narrative portion of the PO, please notate "Narrative attached" in the description of the PO so that the Business Office can download that information.
  
3. Purchase Order Request for supplies must include:
  - a. In description - what is being purchased and reason for purchase.
  - b. Must select the correct contract in Skyward that matches the one on the quote.
  - c. Attach the quote to the PO req in skyward.
  - d. Purchase order details should match the quote - if there are 10 lines with items in the quote you will have 10 purchase order detail lines.
  
4. Purchase Order Request for Hotels must include:
  - a. In description - Who is traveling, why they are traveling, check in date/check out date.
  - b. PDF of hotel that has been chosen that meets the GSA rate requirements that shows room choice and [GSA rates](#).
  - c. Lines on the PO should show room cost and parking if there are fees for parking.
  
5. Purchase Order Request for Travel Meals must include:
  - a. In description - Who is traveling, why they are traveling, dates they are traveling days - which dates are full days at the event.
  
6. If Activity Funds, you will follow all of the procedures above with the following notes:
  - i. 461 and 865 accounts do not have budgets. Instead, it is your responsibility to ensure that each group is not spending more than they are bringing in during the year.
  - ii. Field trips need to be submitted to the Business Office no later than 5 business days prior to the event (please communicate to your teachers).
  - iii. Event fees or meals can either be paid from the UMB card, a physical check, or a Purchase Order invoice, but at no time is cash acceptable.
    1. All cash needs to be either deposited in the bank or fees can also be paid through HomeTown ticketing.

7. If funds are not available in your budget, you will need to contact the Business Office to do one of the following:
  - i. Request a transfer of funds from the same function code (same day adjustment).
  - ii. Request a budget amendment from a different function code (Board approval required).
  - iii. Utilize activity funds.
  
8. Confirmation and approval
  - a. A purchase order will be sent to you via email once it has been processed by the Business Office. Just because it receives final approval from the CFO does not mean you are authorized to spend, purchase, etc. - but will need to wait until you have the PO in hand.
  - b. Orders are sent from the Business Office only (with limited exceptions) since they need to be processed under each purchasing cooperative's bid portal.
    - i. Once an item has been ordered, you will receive an email confirmation from either the vendor directly or from the Business Office staff.
    - ii. If you are unsure if an order has been ordered or approved, please contact the Business Office staff.
  - c. If you are using a UMB card, you will need to confirm that the funds are on your account by waiting for a confirmation email from the Business Office.
    - i. Note that some of the purchases have a timeline associated with them. This means that if the purchaser does not spend the funds in the allotted time, the funds will expire from the card and you will need to contact the Business Office for an extension.
    - ii. All receipts must be sent to your campus/department finance clerk or sent to [umbreceipts@godleyisd.net](mailto:umbreceipts@godleyisd.net) email address within 3 business days of the event.
      1. Please contact your campus/department finance clerk if you are unsure of where to send receipts first, as this might delay the receiving process on their end.
      2. If no receipts are sent in that timeframe, the purchaser could lose the ability to use a UMB card for future items.
  - d. Only spend funds on what was authorized - nothing else.
    - i. If you have an approved PO, you are required to spend the funds in that manner listed.
    - ii. No additional items or substitutions for purchased items are allowed unless you receive written approval from the Chief Financial Officer.

## 9. Receiving and Invoicing

- a. Once an item has been received by the department or campus, they must confirm the quantity of the items received in the purchase order system.
  - i. If there are discrepancies, please contact the Business Office for further direction.
- b. After receipt of the items, the invoice should be sent to [accountspayable@godleyisd.net](mailto:accountspayable@godleyisd.net), but if it is sent to you directly, please forward as soon as possible.
  - i. It will be your responsibility in your budget code if a late invoice is received, regardless if there are funds available or not.
- c. Once the invoice and receiving have been completed, the Business Office will issue payment to the vendor.
- d. Keep all documentation for reference and/or auditing purposes.

If your PO does not have the items above, it will not pass the verification process and could be returned to you, delaying the approval process!

### Timelines:

- Once it reaches the business office, we will process it within 3 business days.
  - If you have not heard back within this timeframe, please contact us for an update.
- If your PO needs additional information or is returned, it will be placed back in line and reviewed in order with the other POs. In other words, it goes to the end of the line and will be processed again after the other POs in front of it are processed.

## Check Request Checklist

- The only difference between a Purchase Order Request and a Purchase Order Check Request is how the vendor will be paid and/or notified of the order.
  - A Purchase Order Request is sent to the Cooperative or Vendor through their portals.
  - A Purchase Order Check Request is paid directly to the vendor via check.
  - Ex: A field trip requires payment to the event, but we will not send this through the purchasing portal, instead we will issue a check that is sent directly to the vendor.
  - Ex: Fees associated with an athletic event made payable to the other district will be sent via check request.
- To ensure that this is done correctly, all purchase order check requests must have "CHECK REQUEST" and the date needed listed before all other information in the description.
  - Ex: CHECK REQUEST for 01/23/26 - Athletic Event Fees for Soccer...
  - Please put the date needed by only, otherwise it might cause confusion for the Business Office staff when prioritizing what checks need to be paid by when.
  - In the narrative section, please notate if the check is to be mailed or not.

## Other Resources

All GISD [Business Office forms](#) and procedures can be found on our website. They include, but are not limited to, the following:

- Activity Fund manual
- Cooperative Vendor List
- State and Federal Grants (EDGAR) manual
- UMB Bank Purchasing Card manual
- Travel Guidelines
- GSA Rates
- Mileage Log and Reimbursement form

The GISD [Purchasing forms](#) are also listed on our website and include:

- IonWave vendor registration and RFP submission
- Purchasing Cooperatives approved by the GISD Board of Trustees

A [Who to Contact at the Business Office](#) form can be found on our website so that you can route your questions to the appropriate staff member.