

Greenwood Lake UFSD Purchasing Guidelines and Best Practices

1. Quotes

- A **quote must be included with every requisition** (with the exception of the Big Three, see #7.)
- Quotes should **not include tax** and must be requested **based on any existing contract pricing** available to the District.
- Quotes help expedite order processing, ensure accurate account/budget encumbrances (including shipping and handling), and alert you early if an item is **backordered, out of stock, or unavailable**.
- **Screen prints and website cart printouts are not acceptable quotes.**
- If you need assistance obtaining a quote, please contact your building secretary.
- Quotes should be attached to the requisition and submitted to the main office for approval.

2. Shipping Address

All purchase orders and quotes should list the following shipping address:

Greenwood Lake Middle School
1247 Lakes Road
Monroe, NY 10950

3. Vendors

- Always **prioritize vendors who are already in our system** and on a **contract**.
- Vendors not previously used will require a **W-9 form** to be added to our vendor system. Please submit the W-9 along with the quote/requisition.

4. Vendor List

A comprehensive vendor list will be provided to indicate:

- Whether a vendor is on a **contract (preferred)**
- The **contact person or email** for quote requests

Most vendors respond within 1–2 business days with a quote.

5. Contracts

Contract pricing offers substantial savings through discounted rates and often includes free shipping.

- **Always request contract pricing** and ask vendors to include the **contract number** on the quote.
- These savings allow for more efficient use of district funds.

6. Requisition Forms

- When a quote is obtained, detailed descriptions on the requisition are not required; however, please include a general description of what is being ordered i.e. “chairs” “classroom supplies”
- It is essential to complete all fields on the requisition form, especially the “**Deliver Materials To:**” line.
- You can find the requisition form on our website as a [printable](#) version or a [downloadable](#) version.

7. Exceptions: Online Ordering

The following vendors allow online ordering and should be **prioritized whenever possible**:

- **School Specialty**
- **Lakeshore Learning**
- **WB Mason**

Steps for Online Ordering

1. Complete your cart online and submit it for approval.
2. Fill out a **Purchase Requisition Form** noting your **cart/order number** in the description.
3. Print your submitted cart/order form and attach it to the requisition and give it to your **building principal** for approval.

8. Requesting a Quote

To request a quote, simply email the vendor contact with the following details:

- **Item number and description** (include the exact item number when possible)
- **Quantity**
- **Contract reference number**, if available
- **Shipping address:**
1247 Lakes Road, Monroe, NY 10950

Example Email:

To: quotes@sales.com
Subject: Quote Request – Greenwood Lake UFSD

Good morning,

Could you please provide a quote for the following items on Contract PC123456?

Shipping Address:
1247 Lakes Rd
Monroe, NY 10950

(3) 123-456 Widget A
(5) AB456B2 Widget B

This is for Greenwood Lake UFSD. Please reference the contract number on the quote and note that we are a tax-exempt organization.

Thank you,
[Your Name]

You may send a shopping cart, spreadsheet, or order form if it contains all necessary item details.

Always review your quote for accuracy before attaching it to your requisition.

When unsure of the contract reference, include this note in your quote request:

“Please include applicable contract numbers (NYS OGS / SourceWell / Omnia Partners / NCPA / TIPS / Equalis / GSA Schedule 70 or 84) on all quotes.”

9. Multiple Quotes and New Vendors

- Purchases from **non-contracted vendors** should include **two additional quotes** from competing vendors.
- **New vendors** must submit a **W-9 form** with their quote and must be able to:
 - Accept a **purchase order**, and
 - Provide a **tax-exempt invoice** payable by district check.

10. Submitting a Claim Reimbursement

- If you are unable to obtain items through our established vendors and choose to make a purchase out of pocket with the intention of being reimbursed, please follow the steps below:
 - **Pre Approval:** Estimate the total cost of your intended purchase and submit a **Purchase Requisition Form** to your building principal for approval **before** making the purchase.
 - **Claim Submission:** After completing the purchase, attach the **original itemized receipt** to a **Claim Reimbursement Form** and submit both documents to the Purchasing Department.
 - Claim reimbursement forms are found on our website in a [printable](#) version or a [downloadable](#) version.
 - **Tax Exemption:** Please note that **sales tax will not be reimbursed**. If the supplier accepts tax-exempt documentation, you may present a copy of our **Tax Exempt Letter** at the time of purchase.

11. NYS Audit Compliance Reminder

From the **2021 NYS Audit (Report 2021-M-147)**:

“The purchasing agent is responsible for ensuring staff involved in purchasing appropriately solicit competition by obtaining quotes or proposals as required by district policies.”

12. Field Trips

- Follow the guidelines found on the district website:
 - Staff Resources → Staff Documents → Field Trips
 - Step 2: Financial
 - Request an invoice from the trip venue that includes all costs (i.e. adult/student admissions, bus parking, lunch cost, etc.)
 - Submit Purchase Requisition with attached invoice to the Business Office ASAP. Please note if the venue has a deadline for down payment as well as any specific requirements for making the payment. **Give the business office ample time to process the request.**