

Procurement Training for Secretaries

It Starts with a PO / #POFIRST

PROCUREMENT HOME PAGE: [Procurement Services – Home](#)

SHAREPOINT: [Procurement Services – Home](#)

TRAVEL: [Travel - Fort Worth Independent School District](#)

September 15, 2026

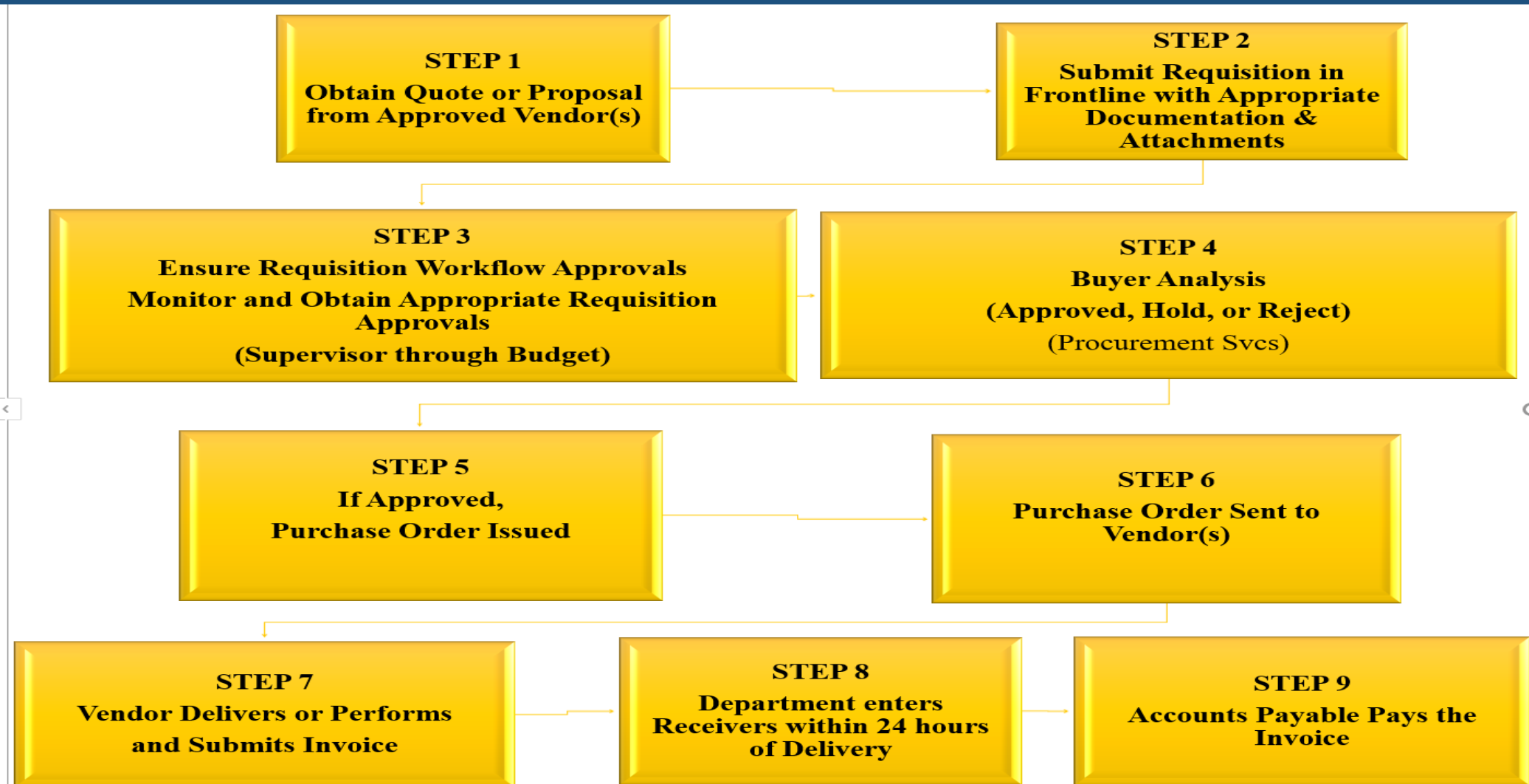
Fort Worth
INDEPENDENT SCHOOL DISTRICT

PROCUREMENT SERVICES (Procurement, Travel, P-Cards)

MISSION

1. FWISD Procurement Services Department is committed to sound financial management through integrity, stewardship, planning, accountability, and open communication. Our goal is to provide approved vendors for quality products and services required for District operations at the best value, at the time and place needed and in the proper quantity and quality.
2. Our Department strives to have a well-balanced purchasing strategy to increase efficiency and effectiveness. Therefore, we Utilize both Formal & Informal Competitive procurement methods such as Bids, Request for Quotes, Request for Proposals, or Competitive Sealed Proposals, and other legal methods such as Interlocal and Cooperative Agreements.
3. **Major Functional Areas:** Procurement & Purchasing, Travel Management, , P-Cards Management
 - a. **PROCUREMENT HOME PAGE:** [Procurement Services – Home](#)
 - b. [Procurement Department Staff.pdf](#)
 - c. [Buyer Commodity/Category Codes – Assignments](#)
 - d. **TRAVEL:** [Travel - Fort Worth Independent School District](#)

Quote – Requisition – Purchase Order – Payment Cycle



Method of Payment

Check Request vs PO vs Credit Card

1. Read the invoice/quote from the vendor to identify which method of payment they accept.
2. If unsure, contact vendor.
3. Requisitions/credit card/ check requests will be denied if the vendor prefers a different method of payment
4. Check Request: Triple check the address on quote/invoice matches the remit to address in Frontline.
5. If address is not available, contact Stella Zavala @ stella.zavala@fwisd.org
6. Registration for non-local events should be added as part of the travel request, NOT a credit card request.

Requisition Entry Reminders

1. The **appropriate** category must be selected **based on what the actual items or service being purchased**, not what the items are being used for.
2. Cart validation box should include who the items are for and how they are being used. Do not just write "supplies"
3. Make sure your quote is attached (when applicable), is a valid quote (not expired), from the correct vendor and with a purchasing mechanism listed.
4. The quote must show the new accounts payable address for the District Service Center (Camp Bowie Blvd).
5. Requisitions can take up to a week for approval WITHOUT grants/RISE/CTE approval so give yourself enough time.
6. If the category is not available for the vendor, contact procurement services to **request the category be added.**
7. All requisitions that are saved for later, not released, or not approved are automatically voided by the system after 7 days.
8. All Requisition lines must be approved by the budget owner PRIOR to the full approval of the requisition. This ensure the requisition is moved to the buyer's queue (Buyer Analysis).

REQUIRED DOCUMENTS/QUOTES

Vendor price quotes are Essential documents for Requisition Processing.

- Vendors must be **AWARDED** vendors. The exception is if using 895, 890 or 891 funds.
- Vendor quote date must be valid.
- **The vendor MUST include the Cooperative Contract Number or the Bid number on the quote.**

Quotes must have precise line-item descriptions and pricing.

- Includes Shipping (if applicable)
- Excludes Taxes

You do not need quotes for E-Procurement Requisitions.

- (Unless you are making a purchase with Federal Funds)

Shopping Carts (other than from the marketplace) are not accepted as an official quote.

- (ex. Screen Shots)
- Requesting a quote ensures that contract pricing is given. A shopping cart will not show contract pricing.

Enter item information as shown on the quote. Add each line if the quote has more than one line.

WHEN YOU NEED MULTIPLE QUOTES

Depends on Two main Factors

1. Depends on Type of Funds used (Local or Federal)
2. Depends on the Estimated Dollar Amount of the Purchase
3. Refer to the Purchasing Matrixes below

NOTE:

Shopping carts and Screenshots (other than from the marketplace) are UNACCEPTABLE!

- Shopping carts do not provide contract pricing.
- Screenshots are sometimes hard to read.
- A quote from the vendor works best.

WHEN YOU NEED MULTIPLE QUOTES

General Funded Procurements

LOCAL/GENERAL FUNDS

Purchase Commitment Amount	State Method Education Code §44.031	Vendor Response Documentation	BOARD APPROVAL REQUIREMENT
Purchases \$1 to \$99,999 aggregate	§44.031 Informal Procurement Method	INFORMAL PURCHASE End User May Obtain Quote 1 Quote Required From Approved Vendor with Fair & Reasonable Price	BOARD APPROVAL NOT REQUIRED
Purchases \$100,000 to \$250,000 in aggregate Multiple quotes required unless Approved waiver by Procurement Services Contact Purchasing to discuss competitive requirements	TEC, §44.031 Formal Procurement 1. Competitive bidding 2. Competitive proposals 3. RFP 4. Interlocal contract 5. RFQ (Coop)	FORMAL PROCUREMENT Proposals to be Solicited by Procurement Services through IONWAVE e-Bidding Platform RFP Or RFQ (Coop) Required Requires Specifications, Formal Proposal Responses Evaluation & Scoring Contract (If Necessary) Board Approval (\$250K above)	BOARD APPROVAL NOT REQUIRED FOR PURCHASES LESS THAN \$250,000
Purchases \$250,000 and above in the aggregate	TEC, §44.031 Formal Procurement 1. Competitive bidding 2. Competitive proposals 3. RFP 4. Interlocal contract 5. RFQ (Coop)	FORMAL PROCUREMENT Proposals to be Solicited by Procurement Services through IONWAVE e-Bidding Platform Requires Specifications, Formal Proposal Responses Evaluation & Scoring Contract (If Necessary) Board Approval (\$250K above)	BOARD APPROVAL REQUIRED FOR PURCHASES GREATER THAN \$250,000
SOLE SOURCE PURCHASE	CRITERIA 1. TEC, §44.031 – Sole source allowed if existence of a patent, copyright, secret process, or monopoly,		

WHEN YOU NEED MULTIPLE QUOTES

Federally Funded Procurements

FEDERAL FUNDS THRESHOLDS & PROCUREMENT METHODS

Purchase Commitment Amount	Federal / EDGAR Method	Solicitation / Procurement Method	BOARD APPROVAL REQUIREMENT
\$1 to \$15,000 aggregate	§200.320(a)(1) Micro-Purchase	INFORMAL PURCHASE End User May Obtain Quote 1 Quote Required	BOARD APPROVAL NOT REQUIRED
Purchases \$15,001 to \$99,999 in the aggregate	200.320(a)(2) Simplified Acquisition	INFORMAL PURCHASE End User May Obtain Quotes 3 Price Quotes Minimum from RFP AWARDED VENDORS Or APPROVED COOPERATIVE	BOARD APPROVAL NOT REQUIRED
Purchases \$100,000 to \$350,000 Single or Aggregate Submit Specifications / SOW to Procurement ~~Syca~~ for Solicitation through IONWAVE e-Bidding Platform	§200.320(a)(2) Simplified Acquisition Requires Specifications or Scope of Work Formal Proposal Responses Evaluation & Scoring Contract (If Necessary) Board Approval (\$250K above)	FORMAL PROCUREMENT Proposals to be Solicited by Procurement Services through IONWAVE e-Bidding Platform Purchasing Methods Options: RFQ – Proposals/Quotes from Coops RFP – An Advertised Solicitation Interlocal Contract Collaborate & Coordinate with Procurement Services to execute the Procurement process	BOARD APPROVAL REQUIRED for Purchases greater than \$250K
Purchases \$350,000 and above FORMAL PURCHASE Submit Specifications / SOW to Procurement ~~Syca~~ for Solicitation through IONWAVE e-Bidding Platform	§200.320(b)(1) Sealed Bids and Proposals; §200.324 LEA is required to conduct cost or price analysis on all procurements.	FORMAL PROCUREMENT Proposals to be Solicited by Procurement Services through IONWAVE e-Bidding Platform Purchasing Methods Options: RFQ – Proposals/Quotes from Coops RFP – An Advertised Solicitation Interlocal Contract Collaborate & Coordinate with Procurement Services to execute the Procurement process	BOARD APPROVAL REQUIRED for Purchases greater than \$250K
SOLE SOURCE PURCHASE	Required TEA approval. Contact the Grants, Department for TEA approval Request Form.		

Purchasing from Amazon AMAZON Requisitions



- Amazon is an e-procurement vendor (similar to Office Depot, Staples, etc.). You do not need to “ask permission” to utilize within reason but is still a last resort, especially for commodities, categories, and asset type items, technology items that have been awarded through FWISD Bid Awards. Amazon does not replace our approved vendors that offer products we are currently utilizing. Awarded vendors are our primary approved vendors for certain Commodities and Products and should be quoted and utilized first, before using Amazon. Example: Furniture; Furniture purchases should come from approved Furniture supply companies and existing RFP’s.

Purchasing from Amazon AMAZON Requisitions



The Amazon Ordering Process

1. Create your cart via the EUNA Marketplace. Transfer the cart so the administrative assistant can enter the requisition. Enter the marketplace via Classlink. Pricing is held for seven (7) days. The clock starts when the cart is created.
2. The Administrative Assistant will enter the order through the e-procurement requisition process.
3. Upon approval, the Purchase Order will print. Most items do not require a delivery fee and are next day delivery as the District is an Amazon Prime Member.
4. The Purchase Order will continue to follow normal procedures. Administrative Assistant will perform the receiving in the system.
5. Amazon will send invoice to Accounts Payable for payment.

Purchasing from Amazon AMAZON Requisitions



Items I am not allowed to purchase:

- Alcoholic beverages, APPLE products, Technology Equipment(computers), Amazon Devices & Products, Gift Cards, Janitorial Supplies, Services, items from another country. This is not an all-inclusive list but serves as a guideline as there are other items that will not be allowed.
- Problems with my order: If you have any issues with your Amazon order, contact Amazon Business Customer Service at 1.866.486.2360. The business customer service is dedicated for business customers only.

eProcurement

1. Do not add manual items to eProcurement requisitions
2. If a manual item/line is added, the requisition will be rejected.
3. If you have a special quote from an ePro vendor, add ALL lines manually.

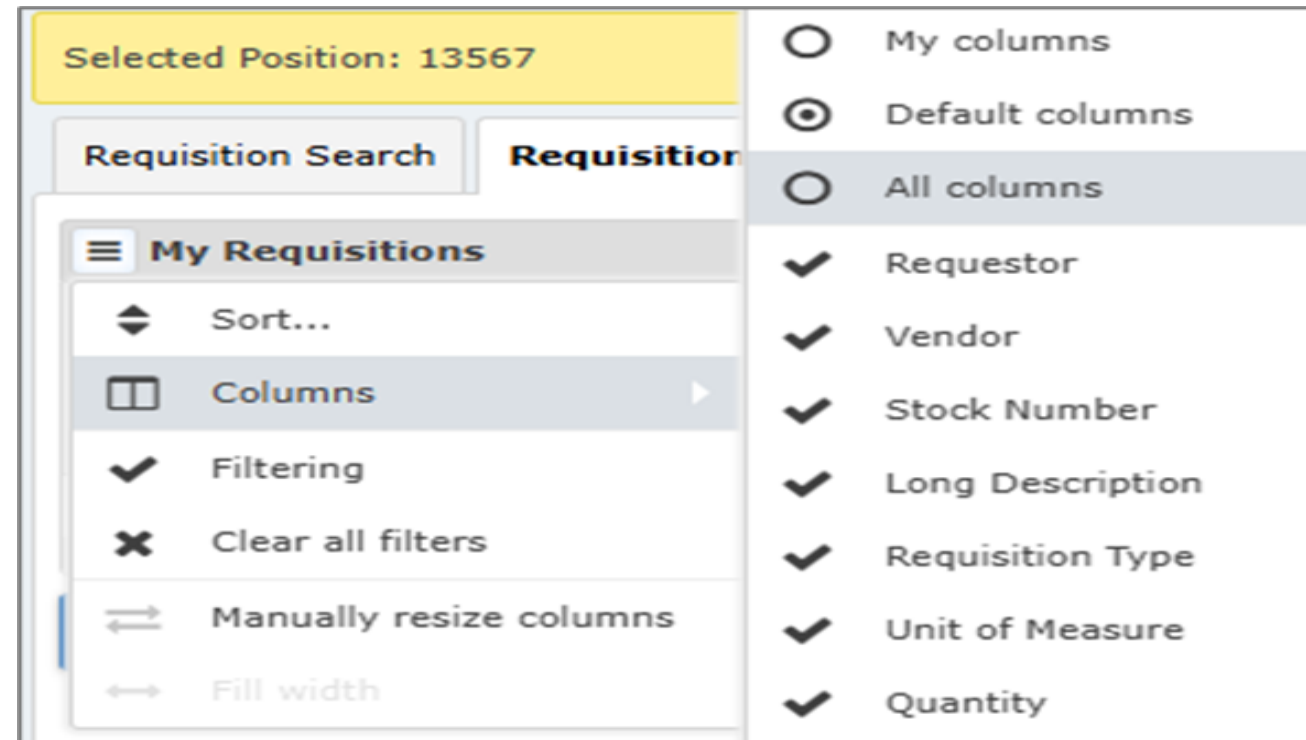
Common Object Codes*

- 6249 – Maintenance contract/Repair Services
- 6299 – Miscellaneous contracted services
- 6329 – Books & other reading materials
- 6399 – Software, Furniture and Equipment < \$10,000 6639 - > \$10,000
- 6399 – Musical Instruments < \$10,000
- 6495 – Membership Dues
- 6399 – General Supplies
- 6495 - Memberships
- 6411 – Registration/Staff Travel
- 6412 – Registration/Student Travel
- 6499-007 – Food
- 6499 - Fees
- 6269 – Copier Leases
- 6269 – Room Rentals
- 6269 – Other rentals (i.e. equipment from Taylor's Rental/Bounce Houses)

*Please reach out to your budget manager with any questions regarding object codes.

Checking the Status of a Requisition

- **Use Requisition Search or Project/Blanket Requisition Search**
- **Make sure stage, status, and next in workflow column are activated**



Checking the Status of a Requisition

- **Check Stage, Status, and Next in Workflow**

Stage v	Status v	Next in Workflow v
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- **Not Approved= rejected by budget owner, CTE, Grants, RISE etc.**
- **Not Released = rejected by procurement**

Common Rejection reasons

- Quote is not attached (non-marketplace requisitions), **The quote is valid for 45 days from creation if it does not have an expiration date.**
- Quote does not include cooperative contract or RFP info.
- The quote total does not match the requisition total
- Incorrect account code.
- Meeting agenda/flier not attached (requisitions for food).
- Lines missing from requisition
- **NOTE: You will receive a notification for each line that is rejected**

REJECTED

PROCUREMENT NO-NO'S

DO NOT:

Allow a vendor to provide goods or services without a purchase order in place. Doing so violates Board Policy CH Legal/Local.

Give the vendor a cart name to place an order or send a PDF copy OR screenshot of the requisition. A requisition is not an official purchase order. **EXCEPTION: A CART NUMBER OR CART NAME CAN ONLY BE USED TO HOLD A REGISTRATION.**

Send the vendor the Frontline email stating your requisition has been converted to PO 26XXXXXX. This is not the purchase order. The email is only a notification that the requisition has been converted. There are other processes in Procurement that need to occur before the OFFICIAL PURCHASE ORDER is sent to the vendor.

Please remind your staff that doing any of the above can result in double shipments which the school will be responsible for.

The OFFICIAL PURCHASE ORDER is sent from Frontline to the vendor or to the user via Secure Link

REMEMBER #POFIRST!

NON-COMPLIANT PURCHASES

Also known as After-the-Fact-Purchases/Board Policy (CH Legal/Local)

All purchase commitments shall be authorized on a properly executed and issued purchase order in advance of the purchase. “...persons making unauthorized purchases shall assume full responsibility for such debt.”

Document these purchases as below:

1. A letter of Explanation to include the reason for the violation.
2. The letter is to be signed by the appropriate EDSO.
3. If the expenditure exceeds \$250,000, Board Ratification will be required.
4. The signed Letter of Explanation and the original invoice must be submitted as an attachment to a requisition entered into the Financial ERP system.

Remember #PO FIRST

DISTRICT CARD REQUESTS



Requests will be rejected for using the incorrect category

List the names of up to 3 people who can use the card

Contact the buyer for requests needed ASAP

A screen shot of the shopping cart is sufficient to show pricing

Remind your teachers/administrators that ONLY items listed on the credit card request may be purchased

**Each credit card request is only valid for one store visit.
"Left over" funds cannot be used at another store**

DISTRICT MANDATED FIELD TRIPS

Refer to the Field Trip Pack for 26-27 published by Leadership for information/pricing.

Use category Field Trip regardless of funding type

The requisition needs to include the date of the field trip and a description of the field trip. i.e. Casa Manana Alice in Wonderland February 8, 2025.

All requisitions must have pricing documentation attached. Botanic Garden trips require the finalized invoice from the vendor.

Use the number of students attending the field trip as the quantity. DO NOT USE 1 as the quantity.

Include any free tickets from the invoice on the requisition



OTHER FIELD TRIPS

Use category Field Trips

The requisition needs to include the date of the field trip and a description of the field trip.

- **Chemistry Camp – June 18, 2025. Admission to the Perot Museum of Nature and Science.**

Use the number of students attending the field trip as the quantity. DO NOT USE 1 as the quantity.

Use object code 6412 regardless of fund type

Most field trip vendors with the exception of the ZOO and Main Stay Farms accept Purchase Orders. Call procurement if unsure.

Check Runs are only on Thursdays.



FOOD PURCHASE GUIDELINES



Parent involvement activities whereas refreshments are imperative to encourage attendance.

Snacks are vital to conduct nutritional education programs for parents.

A Flyer and/or an Agenda for the event must be attached to the paperclip on the requisition.

Follow the Food and Incentives Smarter School Spending For Student Success Guide issued by the Management & Budget Department.

**Current food vendors:
KROGER/COSTCO/HEB**

FOOD PURCHASE GUIDELINES

The non-Food Items object code will be 6399

- **Example: (plates, napkins, cups, flatware)**

The food-Items object code must be 6499

- **Example: (bread, milk, cheese, candy, chips)**

If you are not sure about your budget contact your Budget Manager.

- **NOTE: Funds 865 and 890/891 do not allow changes to the object code.**

Be sure to include the date if the food is for an event in the cart validation section.

- **Example: 9/25/2024 – Muffins for Mom**
- **Example: 10/6/2024 – 1st Grade Award Ceremony**



Food Purchasing Accounts



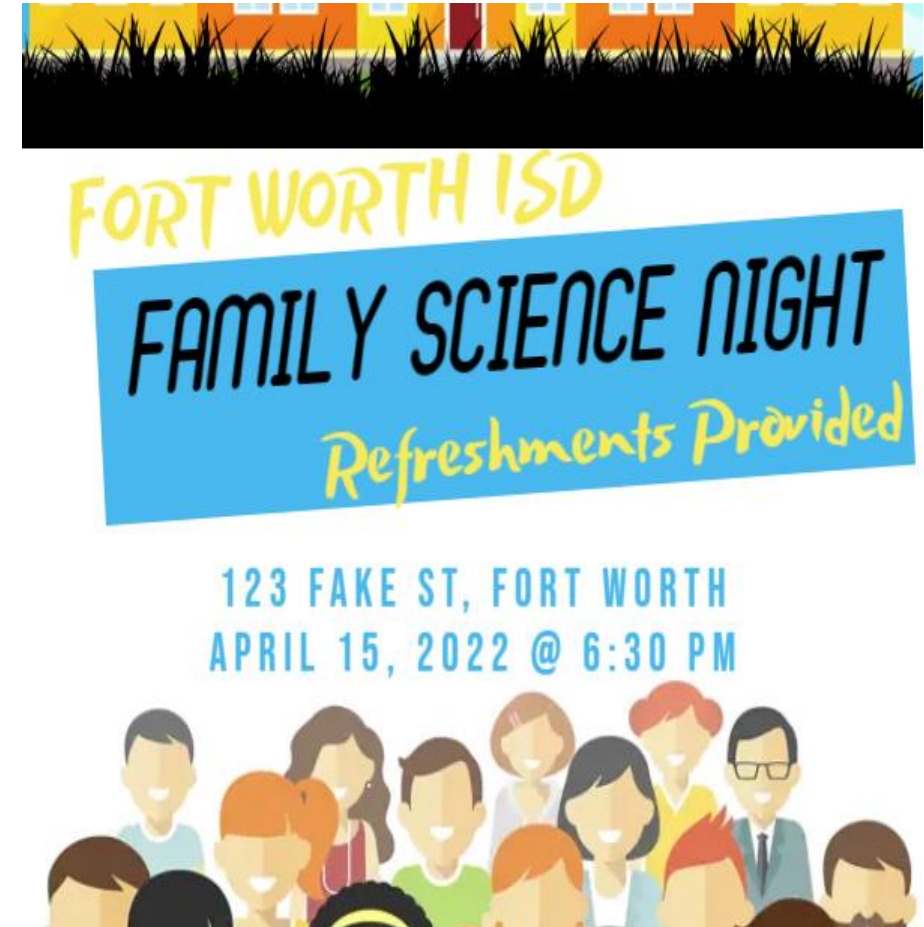
- 199 - xx - 6499 – 007 for general funds only.
- 211 or any grants – xx – 6499
- 499 – xx – 6499
- 461 – xx – 6499
- 865 or 891 – xx – 6399
- If for culinary class or for instructional Obj 6399 (use category Instructional Supplies)

FLYER/AGENDA EXAMPLES

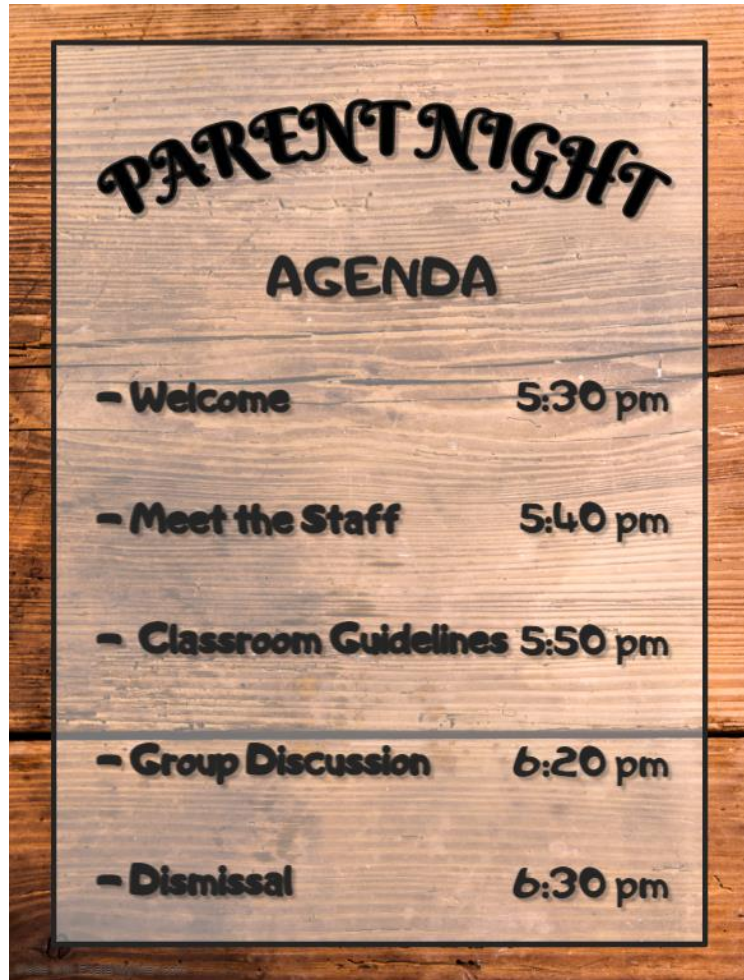


BACK TO SCHOOL Faculty Meeting

- Welcome 8:30 am
- New Staff 8:40 am
- Procedures Review 8:50 am
- Update Staff Info 9:20 am
- Dismissal 9:30 am



AGENDA SAMPLES



COSTCO REQUISITIONS

- **Submit as a traditional requisition**
- **You must always indicate the reason for the purchase, date of event by agenda, or event flyer attached.**
 - Special cases: students with impairment, nurse's station needs, student activity funds, etc. Indicate in General Notes: Class or Nurse's Station Needs (*not Description Field*).
- **1st Line**
 - **List items being purchased in the description field. - round up for safety**
 - Can be generic terms (Sodas, chips, plates, napkins, juice, cookies).
- **2nd Line**
 - **2.96% Administrative Fee- round up for safety**
- **If purchasing food for meetings/trainings/staff development/student activities, an agenda MUST always be attached to the requisition.**
- **The requisition does not need to be itemized.**
- **Shoppers can only pick up items that are listed on the purchase order. Items not listed can't be purchased.**
- **Order total cannot exceed PO total. Purchase Order changes cannot be made for Costco**
- **Purchase orders are only good for one visit. A new PO needs to be issued for each visit.**

TECHNOLOGY BASICS

1. Items included on the IT Master List do NOT require prior approval from Tech Procurement to purchase IF:
 - They are purchased from the approved vendor
 - They are purchased through the online marketplace
 - Purchase items such as monitors, charging carts, document cameras, projectors, and scanners.
2. Email techprocurement@fwisd.org for quotes to purchase equipment such as computers, tablets, laptops and poster makers.
3. The purchase of supplies such as mice, keyboards, headphones, webcams, etc. do not need to go through DOT (object code 6399).
4. Personal printers can no longer be purchased.

Dept. of Technology Standard List

A list of standard technology items is posted in the marketplace.

1. In the marketplace, click the **cart icon** and select **Shopping Lists**. The DOT Standard List will pop up. Click the link.
2. Select the item(s) and add the quantity needed. Once all items are selected, click **Add to Cart**, then click **View Cart**.
3. Click the **Checkout button** and the cart will move to the requisition.
4. Teachers and staff members who need to order technology items can access this same list via Classlink. All of the steps above are followed but instead of them clicking Checkout, they will click **Transfer Cart** so that the cart is sent to the requisitioner.

Toner

- There are two vendors toner should be purchased from: Academic Supplier and Dream Ranch.
- When purchasing toner with general funds (199), the purchase must be made through Academic Supplier or Dream Ranch. If neither vendor has the toner needed, then you may purchase from **another vendor awarded to an RFP**. This reason must be noted on the requisition **and the vendor quote summary form**.
- When purchasing toner with federal funds, two of the three required quotes must be from Academic Supplier and Dream Ranch. The third vendor quote can be from ODP (Office Depot) or Staples. **A quote from Amazon is not acceptable for a third quote as we do not purchase toner from Amazon.**
- If the quote from the third vendor is less than that of the Academic Supplier or Dream Ranch, the purchase will be allowed.

COMPUTER SOFTWARE, SUBSCRIPTIONS AND LICENSES



1. All software, subscriptions, and licenses will require a Data Sharing Agreement (DSA) if student or employee data, other than names are being collected. Requisitions will not be converted unless there is an executed Data Sharing Agreement (DSA) in place. The listing of current DSA's can be found in the Procurement Services Sharepoint site.
2. The vendor must be awarded to an RFP or Purchasing Cooperative.
3. The software/subscription/license start and end dates must be stated in the description or general notes.
4. Choose the Category based on the purchase and object code 6399 or 6639 for software subscriptions/licenses.
5. Do not attach expired quotes. The quote must show the new address for the District Service Center.

Scholarships/Tuition/Memberships

Be sure to select the correct address/remit address as shown on the form/attachment.

Scholarships – do not include any social security numbers anywhere on the requisition. If on the award form, redact it. Use the student number issued by the University/College as the reference number in the description.

Scholarship's category code is Achievement, Awards, Graduation



CONTRACTING INFORMATION for Consultants/Contracts

Consultants - All potential consultants need to respond to RFP 21-083 Academic/Educational Consultants.

Enter one (1) requisition for Professional Development/Training when required books/materials associated with the training need to be purchased. One line is for the training (object code 6299) and the second line will be for the purchase of required materials (object code 6329).

Contracts – Allow at least 10-15 days for processing. Some contracts may take longer.

Contracts – Any contracts pertaining to Technology Services, online licenses, software/online subscriptions should be sent to Kaleisa.Jackson@fwisd.org for approval.

Contracts – Any contracts pertaining to consultants, Professional Development, Speaker, Events, etc. should be sent to Tina.Harris@fwisd.org for approval



CONTRACTING INFORMATION for Consultants/Contracts

Procurement Services - Contract Information - All Documents

a. Procurement Services is the official repository of all Procurement & Contracting Files

b. Contract Administrator Guide

Procurement Services - Contract Administrator's Guide 24-25.pdf - All Documents

c. Step-by-Step Contracting Process

Procurement Services - 3- Contract Process - Simplified v2.pdf - All Documents

d. Contract Decision Tree Flowchart

Procurement Services - 1 Contract Decision Tree Guide.pdf - All Documents

e. Contract Routing Form

Procurement Services - 2 Contract Routing Form v1.pdf - All Documents

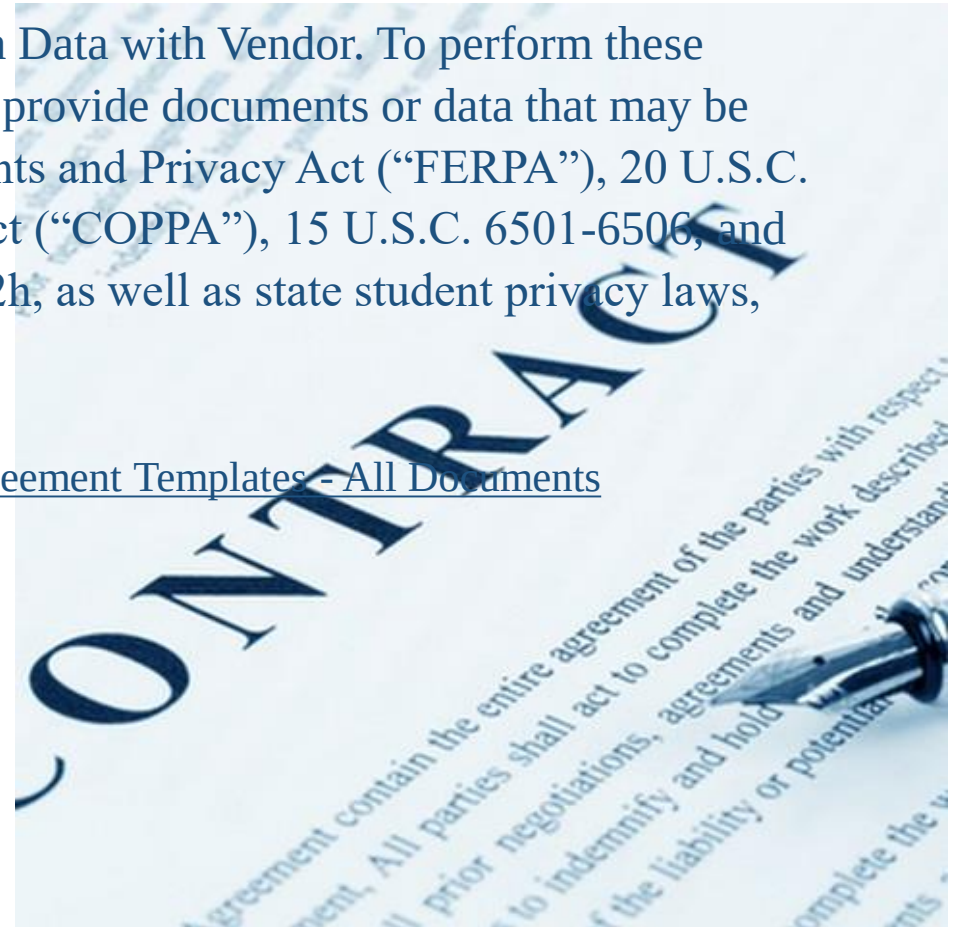


CONTRACTING INFORMATION (DATA SHARING AGREEMENTS)

- a. Needed when it become necessary for the District to share certain Data with Vendor. To perform these Services, the Vendor may receive, or create, and the District may provide documents or data that may be subject to federal statutes, including, the Family Educational Rights and Privacy Act (“FERPA”), 20 U.S.C. 1232g (34 CFR Part 99), Children’s Online Privacy Protection Act (“COPPA”), 15 U.S.C. 6501-6506, and Protection of Pupil Rights Amendment (“PPRA”) 20 U.S.C. 1232h, as well as state student privacy laws, including Texas Education Code Chapter 32.

- b. **Data Sharing Agreement:** [Procurement Services - Data Sharing Agreement Templates - All Documents](#)

Data Sharing Agreement Templates
Data Sharing End User Steps
Data Sharing Agreement Checklist
Executed Data Sharing Agreement



TIME FOR QUESTIONS

Questions Regarding:

1. Procurement Website (How to Navigate)?
2. SharePoint
3. Purchasing Categories, Buyer Categories
4. Dollar Thresholds for Obtaining Quotes
5. Requisition Entry
6. Purchasing from Amazon
7. Consultants Contracts and Contracting Procedures
8. Purchasing using e-procurement
9. Purchases for Food & Catering
10. Purchasing Field Trips
11. Questions regarding Noncompliant Purchases



Fort Worth

INDEPENDENT SCHOOL DISTRICT