

# Purchasing Procedures



## Purchasing Procedures: Quick Reference

All requests for supplies, equipment, and services that obligate **Boyd County Board of Education** funds must be made using a district Request/Purchase Order (PO) form. This includes products requested on a trial basis.

 **WARNING:** Ordering items or services before obtaining an authorized PO constitutes an illegal purchase. **Payment will be the personal responsibility of the purchaser.**

### The PO Approval Process

1. **Submit Request:** Complete a PO request form and turn it in to your secretary or the finance department.
2. **System Entry:** A requisition will be entered into Munis (ERP) and routed through the official approval chain.
3. **Receipt:** Once approved, a copy of the PO will be emailed back to the originator.
4. **Vendor Order:** The originator (the person who requested the order) is responsible for sending the approved PO to the vendor. The finance office keeps the original file.

### Rules for Using an Approved PO

- **Authority:** An approved PO strictly grants authority to spend Board-controlled funds for that specific request.
- **No Alterations:** You cannot change the vendor, increase the amount, or alter an approved PO.
- **No Backorders: Backorders are not accepted.** If an item is out of stock, it must be canceled from the order.
- **Cancellations:** If an entire order must be canceled, notify the finance department immediately so they can void the PO and free up budgeted funds.

### Delivery & Invoice Verification

The finance office does not know when your items arrive; **your prompt verification is vital to ensure vendors are paid on time.**

- **No Delays:** Submit all vendor invoices immediately to the finance office along with a verification to pay. **Do not hold onto invoices.**
- **Packing Slips:** Sign and date all received packing slips. Email them to the finance office to confirm delivery.

### Protocol for Personal Pickups

If you pick up PO items in person and receive a receipt or invoice on-site, immediately:

1. **Sign and date** the receipt/invoice.
2. **Write the PO number** clearly on the receipt/invoice.
3. **Email or send** it to the finance department for processing.

## **Checklist for requisition form (request for a purchase order)**

1. Either type or use blue or black ink pen to complete the requisition form.
2. Please fully complete the vendor information with vendor name, address, and phone number
3. Fill in the complete address where you want your order shipped to (must be a Boyd County Schools location). Mark it to your attention for delivery.
4. Print clearly the item number, description of item, number of units, price per unit, and total cost of each item you are ordering.
5. Complete the subtotal of the order, then subtract discount (if one exists) and add shipping (not all school orders ship for free). Enter in the grand total.
6. Indicate by circling if the item is a fixed asset or not (\$5000 for 1 item).
7. Add the commodity code if technology hardware or software.
8. Write the date you are submitting the form.
9. All requisition forms should be coded before submitting. If you are unsure of the coding, please ask the person who approves the purchase.
10. Submit the requisition form to your school bookkeeper, department secretary, or the finance office so it can be entered into the system for approval.

**Remember the requisition form is not a purchase order. It is just a request for a purchase order.**