

PURCHASING POLICY AND PROCEDURES (Requests for Purchase Orders [PO])

On 7/15/2004, the Board approved the WVDE Office of School Finance "Purchasing Policies and Procedures Manual for Local Educational Agencies" as the county's purchasing policy. The manual can be found at the following link:

http://wvde.state.wv.us/finance/files/Policies/Policy8200_with_Cover.pdf.

The following is the process for purchasing office supplies, instructional supplies, library books, textbooks, subscriptions, training/professional development registrations, direct bill hotel reservations, testing/assessment services, equipment, license renewals, maintenance services, blanket POs, etc. (*when in doubt, submit it on a Requisition.*):

****Please note it is illegal to obligate the county for any purchase prior to receiving a PO number. It is however appropriate, and often times helpful, to contact a vendor to request a "quote" prior to requesting and receiving a PO number. Such quotes should be attached to the requisition.***

- First, complete a Requisition (<http://boe.dodd.k12.wv.us/Forms.htm>).
 - Include ALL requested vendor information
 - Include any special instructions
 - *Attach catalog order form, on-line cart printout, specific instructions as necessary*
 - Include requestor contact information
 - Reference special funding (program numbers/titles)
 - Technology related items (software, hardware, tech supplies, etc.) should be coordinated with the county TSS
 - Requestor signature
 - Principal/Supervisor signature
 - Director signature (for special programs)
 - Be sure shipping and handling is included (if applicable)
 - either estimated or actual
 - If free, please indicate so
 - If the vendor is not a vendor that is typically used, please check with the vendor to ensure they accept POs. If they don't, please try to locate a vendor who does.
- Completed requisitions are to be sent to the Finance Department at the Board Office.
- Upon receipt, the requisition will be date stamped and reviewed for the following:
 - Appropriate signatures
 - Complete vendor information
 - Legible handwriting (if applicable)
 - Appropriate details
 - ***Incomplete requisitions will be returned to requestor.***
- After the initial review, the Finance Director will assign the appropriate account code(s) and obtain the Superintendent's signature (if applicable).
- The requisition is then entered into WVEIS and a PO number is assigned.

- The PO is printed in triplicate
- PLACING THE ORDER
 - *If requested, the PO will be provided to requestor to process the order*
 - Otherwise, the finance staff will place the order by which ever means is most appropriate (phone, fax, mail, email, on-line, etc.)
 - Requestor will be notified by receipt of a pink copy of the PO indicating when the order was placed.
- RECEIVING THE ORDER
 - Promptly check shipment to ensure all items have been received as requested
 - **SIGN and DATE** the pink copy of the PO
 - Please attached any packing slips or invoices received in the shipment
 - Send to the Finance Department at the Board Office.