

## Purchasing Information

1. Confirming Purchase Orders are illegal under NYS municipal law. This is an order which is placed with a vendor for an item or service BEFORE a requisition is approved and converted into a Numbered Purchase Order signed by the District Purchasing Agent. All Confirmation orders must go through the '**Confirming Path**'.
2. Emergency Orders: Emergency provisions pursuant to municipal law allow for the immediate purchase only when a delay would threaten the life, health, safety, property or welfare of the District, staff and students. The use of emergency orders is an exception used only when a true health/safety emergency arises, and must be indicated on the requisition explaining the emergency. The requisition must go through the '**Confirming Path**' & the "**Confirmation P.O. Form**" must be electronically attached. It automatically goes to the Asst. Superintendent of District Operations for review.
3. Requisitions: A requisition and purchase order schedule is provided at the beginning of each fiscal year. Requisitions are reviewed and converted into purchase orders weekly. If you have an immediate need, you must call purchasing in order to expedite your requisition. Please keep in mind that our auditor releases purchase order payments and checks bi-weekly.
4. Clear Descriptions of what you are ordering or the service you are requesting is required for auditing purposes. Requisitions with vague descriptions will be returned.
5. Inventory Asset Form and tag(s) will be attached to your "stamped" receiving copy. Attach the tag and complete the form. Return the form with your signed receiving copy to accounts payable. They will forward your asset form to purchasing for input into our inventory system and then proceed to pay the vendor. The vendor will not be paid until the asset inventory form is completed & returned. See the '**Inventory**' **Tab** for more information and forms.
6. Reoccurring Items / Services: Professional services or reoccurring items that are on a bid or contract must be set up at the beginning of the school year on a "Internal Blanket" requisition for the year. This allows you to increase or decrease the blanket order according to your needs throughout the year and avoid having a confirming order. The contract or bid pricing page **must** be attached to your Internal Blanket requisition.
7. Service / Maintenance Agreements: All contracts and agreements **must** be approved and signed by the Board of Education. Contact the Superintendent's office to arrange for the contract/agreement to be put on a BOE agenda for approval. After it is approved and signed, send a copy of the contract/agreement along with your requisition to purchasing. The first line of your requisition must have the BOE approval date.
8. Professional Services are specialized services requiring expertise, professional judgment and/or a high degree of creativity. Requisitions **must** have the BOE approval date & signed contract attached. This requirement includes non-profit organizations & human service contracts in which Parent choice is required. See the '**FAQ/Information**' **Tab** for more details on professional services and agreements.

9. Technology Standards: District purchasing standards have been established for computers, printers, peripherals, and audio visual equipment. These standards were developed to facilitate the ease of repairs and establish a uniform level of quality and manufacture. The types and manufacturer's of equipment to purchase can be ascertained from the Technology Department.
10. Computers and related peripheral requisitions must go through the "**Computer Equipment Path**" or they will be returned disapproved.
11. Software: Requests for educational software must be approved by the Director of Technology. The requisition must be coded to the State-Aided Software code A2630.460.01.0001. Non-educational software must also be approved by the Director of Technology, but should **not** be coded to the state-aided software code.
12. Refreshment / Food Requisitions: A clear explanation of the activity and need must be provided on the requisition as per auditing regulations (*i.e.: participants were not allowed to take their normal break, or cafeteria closed, or provided under guidelines of a grant- **attach grant page** to requisition*) The requisition must go through the "**Refreshment/Food Path**" or it will be returned disapproved.
13. Conference Attendance Forms for teachers are on-line at MLP 'My Learning Plan'. All conferences and workshops that are off-campus must be approved via "My Learning Plan". The approved 'My Learning Plan' attendance form along with the conference or workshop registration & fee application must be attached to the requisition. The form for non-teaching staff can be found under the '**Forms Tab**'.
14. Guest Speaker Form must be attached to your requisition. Please be sure to attach the appropriate form to your req. or we will *not* be able to process the requisition into a purchase order. See the '**Forms**' **Tab** to download form.
15. BOCES At the beginning of the school year the District creates a BOCES blanket purchase order in which we pay all BOCES contracted services throughout the year. All BOCES orders must flow through this District Blanket Purchase Order. If you are ordering something that was not included in our original BOCES contract at the beginning of the school year, these are the steps you must take:
  - A. If you are ordering something through Eastern Suffolk BOCES, you must submit a '**contract modification**' form\* for approval. The item you request will then be added to our contract. **NO SEPARATE PURCHASE ORDER IS REQUIRED!** \*This form is available from the Asst. Superintendent of District Operations.
  - B. If you are ordering something from a BOCES affiliate *other than* E. Suffolk BOCES, you must submit a '**cross-contract**' form\* for approval. The item will then be added to our contract. **NO SEPARATE PURCHASE ORDER IS REQUIRED!** \*This form is available from the Assistant Superintendent of District Operations.

Exception: *The only time you should do a separate P.O. for BOCES is if the item will be charged to a grant, because we cannot get BOCES aid on grant items.*

## Frequently Asked Purchasing Questions

1. Purchasing Cut-Off Dates: The school year runs from July 1st through June 30<sup>th</sup>. All general fund purchasing begins with the school year on July 1<sup>st</sup>. Requisitions for the school year are *generally* stopped in the early spring (Feb./March). Exceptions are granted for emergencies and federally funded orders which stop by the third week of the following August. This allows us time to process payments and essentially 'close our books' to prepare for our annual audit of all school accounts.
2. IRS Form W-9 is required by law. Our financial software system requires that all vendors and individuals complete an IRS Form W-9 in order to assign a vendor # to that company or person. The W-9 form is kept on file and the vendor # allows a requisition to be typed. It does ***not*** indicate the company is an "approved vendor". Approved vendors are companies that hold a current bid or contract for the items or services they sell. See the '**Forms**' **Tab** for W-9 and new vendor forms.
3. When to use a Bid, Contract or Price Compare: As per NYS law, we must have a policy and process when using public funds to purchase items. If an item is not included in a bid or contract, a price comparison form or written quotes must be attached to the requisition. Our auditors will not allow a requisition to be processed without a current & valid Bid#, Contract# or price comparison form attached. See the '**Forms**' **Tab** for price comparison form.
4. What is a Sole Source Purchase: When it is clearly determined that there is only one vendor capable of providing a particular material or service. Our '**Sole Source Affidavit**' **Form** is required from the vendor declaring that they are the sole provider, manufacturer or publisher, and the item or service is not available from any other source. The Sole Source Affidavit must be electronically attached to the requisition.
5. When to use Petty Cash: Expenditures of \$25.00 or less should be paid from petty cash funds. Petty cash should be used only when payment is required upon delivery. Deposits to the fund can not exceed payments from the fund as documented in the form of receipts, bills or invoices. The balance of a petty cash fund may not exceed \$100.00.
6. What is Green Cleaning: ***Longwood keeps getting Greener!*** We are committed to protecting the health and welfare of our students and staff. We have been working to reduce our carbon footprint as part of a comprehensive district-wide environmental program. This program involves teaching our students along with encompassing recycling to reduce waste in our buildings, purchasing non-toxic and recycled products, and pursuing energy efficient and alternative forms of lighting, heating and fuel. We strive for this program to serve as a catalyst to teach the principles of environmentally responsible behavior within our schools and the surrounding community. As of Sept. 1, 2006 all schools in NYS were prohibited from using any cleaning products that are not EPA certified as 'green'. Disinfectants and hand sanitizers may be used under certain health safety circumstances if approved by the Superintendent of Schools. A list of N.Y.S. Approved Green products may be found at the following website:  
[www.ogs.state.ny.us/bldgadmin/environmental/ProductLists.html](http://www.ogs.state.ny.us/bldgadmin/environmental/ProductLists.html)

**We ask you to join us in *Going-Green*, and welcome any suggestions you may have to enhance this program!**

7. Finance Manager / nVision Help: The purchasing dept. & accounts payable dept. will try to guide users with problems and questions. At times it may be suggested that you contact the help desk of our financial software called 'Finance Manager', at 244-4280, 4222, 4291. They can assist in more complicated issues, answer your questions and walk you through all types of situations. Permission & access to Finance Manager / nVision must be approved by the Asst. Superintendent of District Operations. See the **'Forms' Tab** to download form.
8. Equipment is **generally** determined by the following criteria:
- Retains its original shape and appearance with use.
  - Retains its identity by itself (*is not a part inside, hidden or incorporated in another piece of equipment*).
  - It is non-expendable and less expensive to repair than replace.
  - It represents an investment that makes it feasible to capitalize, **generally** with a cost of \$250.00 or more. Items costing \$1,000.00 or more (except electronic/computer items) are inventoried assets. Exceptions are 'walkable' items such as cameras, scientific calculators, printers and other small electronics. These items are determined on a case-by-case basis.
9. When to Get Quotes: When an item or service is not on any bid or municipal contract, we must adhere to our board approved policy as per NYS municipal and education law. See the **'Forms' Tab** for price comparison form.

<u>Total of Requisition</u>	<u>Action</u>
Up to \$ 1,000.	Generally no quotes needed*
\$ 1,000. -\$2,499.99	(3) phone quotes on price compare form.
\$ 2,500. -\$4,999.99	(3) written quotes attached to requisition.
\$ 5,000. -\$9,999.99	RFP (Informal bid) Required. Call Purchasing.
\$10,000.00 & Up	Formal Bid required. Call Purchasing.

\* *When the aggregate amount of all like items purchased by the entire district exceeds any of the thresholds stated above, you may be asked to submit a price comparison or information for an RFP or bid even though your particular purchase is well under the RFP or bid limits. To avoid this, you can use vendors with items on a current, valid bid or contract.*