

Requisition Guidelines & Instructions

Updated 11/07/18

General Purchasing Guidelines: All requisitions must be approved by an administrator/director/supervisor (A.D.S.) prior to being sent to the Purchasing Agent for approval. The following criteria must be met for the price ranges listed below:

\$0-\$999.99: Approval of A.D.S.

\$1,000.00 - \$4,999.99: *Two (2)* quotes from different catalogs and approval of A.D.S.

\$5,000.00 - \$9,999.99: *Two (2)* written quotes and approval of A.D.S.

\$10,000.00 - \$19,999.99: *Three (3)* written quotes and approval of A.D.S.

Back-up documentation should accompany your request. This documentation could come in the form of a quote, bid, e-mail, or a prior approved agreement. There are certain cases where no back-up documentation can be provided. These items will be reviewed on a case by case basis.

PND: This box is for administrative use only. "PND" stands for "pending number". Once the requisition is approved, it is entered into our purchasing software system called Wincap. Wincap creates a pending number that we use to track the requisition.

Requisition Coding: These boxes are used during budgeting season to match up the budgeting summary sheet to actual budgeting requisitions.

General Information: The following general information must be completed for every requisition.

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|-------------------|----------------------------------|
| • Supplier/Vendor | • Date |
| • Address | • Requestor |
| • Phone Number | • Subject/Grade Level/Department |
| • Fax Number | • Budget Code (Admin Use Only) |

Exception: For School Specialty and Staples requisitions, only Supplier/Vendor, Date, Requestor, and Subject/Grade Level/Department must be completed.

State Contract/BOCES Bid requests: If you are purchasing an item off of state contract or BOCES bid, please indicate the state contract or BOCES bid number in the description box along with the general description of the item being purchased.

Expenditure Necessity Level:

- **Need:** This box is checked when something is absolutely needed to support instruction and the learning environment.

- **Want:** This box is checked for items that are not absolutely needed, but will help to supplement/bolster instruction and the learning environment.

Expenditure Type:

- **Computer Equipment/Software/Supplies:** These requests should be turned into the Director of Instructional Technology. It is important that you include item numbers, copies of the catalog/online pages with the selection highlighted, current cost, and shipping/handling fees.
- **General Supplies:** This box is checked for any supplies or material purchases that are not School Specialty or Staples. Supplies and materials are generally considered to be items that are consumable like markers, paper, and paint. Inclusion of shipping and handling is required.
- **School Specialty:** Please use this box for purchases from School Specialty. When looking to order from School Specialty, please go to their website at: <http://www.schoolspecialty.com>. Please log on using your account information. From there, add items to your cart and **save the cart**. Once complete, please print a copy of the cart. DO NOT order the items at this time. Please attach a copy of the cart to the completed requisition. Please indicate "See Attached" **(include the cart number in your description)** in the description box of the requisition. Please note that there is NO SHIPPING cost for School Specialty except when the description indicates that it is a heavy freight item. In that case, please add \$99.00 for shipping. Please limit each cart /requisition to 20 items.
- **Staples:** This is used for purchases from the Staples website at: www.staplesadvantage.com. Please log on using your account information. From there, add items to your cart and when finished, submit your cart. Please print a copy of the cart and attach that to the completed requisition. Do not list individual items, instead indicate "See Attached Cart". There are no shipping costs for StaplesAdvantage.
- **Textbooks:** This box is checked for sets of books that are used for classroom instruction. It is also used for sheet music. Many textbook companies have various derivations of their name with different addresses. Therefore, it is very important that the complete name and address of the publisher be listed on these requisitions.
- **Contractual:** This box is checked for expenditures such as, conferences/mileage, service/repair of equipment, textbook rebinding, piano tuning, music festival fees, sports officials, etc. Please note that there must be a contract on file before an individual is hired for service; excluding sports officials.
- **Newspaper/Magazine:** This box is checked for newspaper and magazine requests. It is important that you provide the complete name and address of the publisher.
- **Equipment:** Please check this box for items that have a cost of at least \$500, are serviceable, and are designed to last in terms of "years". Examples may include desks and chairs, a television, or a wheelchair.