PURCHASING

Purchasing Services Guidelines

2022/2023

Sacramento City
UNIFIED SCHOOL DISTRICT

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COMMODITY ASSIGNMENTS

ROBERT ALDAMA, INTERIM PURCHASING MANAGER
Vehicles, Facilities & Operations Support,
Donations

MELANIE GUTIERREZ, BUYER III
Computers & Peripherals, Audio Visual Equipment,
Classroom Educational Materials, Subscriptions, Furniture,
Child Development, Office Depot Accounts, Amazon Account,
Novels, Office & Technical Equipment,
Supply Works / Home Depot Accounts,
Special Education, Chargeback Increases/Decreases

LEA HARTIGAN, BUYER II
Travel – Airfare/Car Rental/Hotel/Registrations,
Nutrition, Confirming Requisitions, Textbooks,
Ray Morgan Copiers, Blanket Increases/Decreases,
Music Supplies & Equipment, Sports Equipment, Science,
CTE, Charters (Transportation)

TINA ALVAREZ-BEVENS, INTERIM CONTRACT SPECIALIST
Service Agreements and Nonpublic School/Agency Requisitions

Travel Made Easy

All District Travel is procured centrally through Purchasing Services.

In order to process Travel Requests the following must be submitted:

- Travel Request Form (#ACC-F014) SIGNED by all approvers submitted to Purchasing at least 30 days prior to travel date.
- Escape Conference/Travel Requisitions created and submitted by the site and APPROVED by Budget.
- Backup (flyers, registration forms, Etc.) scanned and attached to the requisition(s)
- Send the total packet to Purchasing Box 830, or e-mail to Travel@scusd.edu for processing. (Please note any special instructions)
- Must have a separate requisition for each component of the trip.
  (flight, hotel, car rental, etc.)

IMPORTANT INFORMATION

AIRFARE RESERVATIONS

- Names must be LEGAL NAMES (what is on the driver's license)
- BIRTHDATES and GENDER are required for booking airfare
- Please select times and dates for departures and returns, or your preferred time frames.
- The earlier it is booked the better the price will be.
- Southwest Airlines is our standard airline for travel in California.

Please note: Effective May 3, 2023 a California "REAL ID" will be required for all air travel.

REGISTRATION

- Please provide completed registration forms including course selections, if applicable.
- Most vendors will accept credit card payments for registration; otherwise Accounts Payable may issue a check.

HOTELS
- Provide the hotel name, phone number, and address.
- Note if you are sharing rooms, any special accommodations should be clearly listed.
- Check in date and check out date must be listed.
- District pays for room, tax and parking when required.
  Incidentals are not covered by the District; most hotels will require a personal credit card at time of check-in for incidentals.
- If your requested hotel is not available, you will need to provide alternate options.

Enterprise CAR RENTAL
- Provide name of person who will be responsible for the rental vehicle, this **must be an SCUSD employee.**
- Provide pick-up date and time and location.
- Provide drop-off date and time and location.

PLEASE NOTE: RESERVATIONS CANNOT BE MADE UNTIL ALL DOCUMENTS ARE APPROVED.
PLEASE DO NOT SUBMIT LAST MINUTE PAPERWORK FOR TRAVEL.
30 DAYS ADVANCE NOTICE IS REQUIRED.

Vendor Recommendations

VENDOR NAME	VENDOR #	VENDOR NAME	VENDOR #
Art/Craft Supplies		Office Supplies	
Dick Blick	113854	Office Depot	113902
Discount School Supply	115450	Physical Education Supplies	
Nasco	104077	BSN Sports	106546
School Specialty	009743	Flaghouse	031100
Audio/Visual		Gopher Sports	106852
B&H Photo	002010	S&S Worldwide	114774
Troxell	000013	US Games	109963
Classroom Manipulatives		School Nurse Supplies	
Discount School Supply	115450	School Nurse Supply	117677
Lakeshore	049121	Science Supplies	
Nasco	104077	Carolina Biological	015509
S&S Worldwide	114774	Fisher Scientific	000061
School Specialty	009743	Flinn Scientific	012966
Custodial Supplies		Frey Science	009743
Home Depot (SupplyWorks)	313076	Sargent Welch	077877
Flags		Technology	
Amazon Capital	122373	CDW-G	122960
School Specialty	009743	Walkie Talkies (email Purchasing for quote)	
Furniture		Delta Wireless	108366
School Specialty	009743		
Virco	091769		

HELPFUL HINTS / ESCAPE ON-LINE

- Escape requisitions must be entered in all **CAPS**.
- Detailed description **REQUIRED** for each line item for all requisition types. Please include item number, product number, ISBN, etc. Descriptions marked, "See Attached," will be returned to "Open" status for proper details.
- Instructions for the buyer should be put in the **NOTES** tab.
- Instructions for the vendor should be entered in the **"Message Before or Message After"** line item field.
- To select a vendor:
  - Enter the 6-digit vendor ID number, or
  - Type the first few characters of the name in the vendor ID field, press F4 or click on the drop down arrow, then select the vendor from the list, or
  - Use the % to perform a keyword search, such as %depot or %robinson, then press F4 or click on the drop down arrow to select from the list. This works best if you search for the most unique word in the name (i.e. do not search %sacramento which would produce too many results; for a person, use whichever part of their name is more unique, first name or last name)
- Some vendors have multiple addresses in the vendor file. Please select the correct address. Click in the **Addr ID** field, then select the down arrow to see the addresses available. Note: If you cannot find the correct address, please email Buyer for assistance.
- All backup documentation should be scanned into the **ATTACHMENTS** tab of each requisition.
- All Confirming requisitions must have invoices, receipts, sign-in sheets, etc., scanned and attached in the Attachment tab. Send all original receipts to Accounts Payable, Box 802B. Once scanned it is not necessary to send backup to Budget or Purchasing Services.
- **Confirming requisitions must be under $400.00**. If over, please submit a "Purchasing" requisition with a notation in the Comment field, to **"Treat as Confirming".**
- For food purchases, the agenda, sign-in sheets and receipts must be scanned and attached in the Attachment tab and they must be approved by the Chief Business Officer. Purchasing Services contacts the Chief Business Officer directly for all food purchases. Please allow extra time for processing.

- Employees should not pay presenters directly and then submit for a reimbursement. A Service Agreement purchase order must be issued prior to services being rendered.
- If you are not able to Save/Close a requisition you may not have saved a line item or an attachment before moving on, or you may have entered invalid data in a field (such as location or vendor ID). Check all tabs for open or unsaved information and all fields for **red dots** indicating invalid data.

- **Blanket Order Requisition:**
  Select:
  Vendor Requisition
  Department: Purchasing
  Change Order Type to **Blanket Order (**listed in **Section 2)**
  Blanket Order line items should be marked as NON-TAXABLE so
Escape does not add tax to your not-to-exceed amount.

- **For Chargeback Blanket Orders:**
  Select:
  Vendor Requisition
  Department: Chargeback
  Comments: Specify Vendor- **Office Depot, Ray Morgan or**
  Home Depot - (these are the only authorized Chargeback vendors)
  Vendor ID: list six-digit vendor code
  Chargeback line items should be marked as NON-TAXABLE so Escape does not add tax to your not-to-exceed amount.

Reminders

- **It is crucial that you keep track of your requisition from Open status to Complete status.** Please check the status of your requisition in Escape prior to contacting Purchasing Services.
- To expedite your requisition please make sure your pricing is correct. In addition, be sure to include shipping costs when applicable. If the buyer has to update the prices and the change totals over $250.00 re-approval will be required and cause a delay.
- All orders delivered directly to the site must be Received Online (ROL) in Escape once they are physically received. Be sure to enter the Date Received if different from the current date.

- When requesting a **"RUSH"** in approving your requisition, please remember the approvals are posted in the order listed in the Approval tab (i.e. Level 2 approves before Level 4). The Purchasing Manager's approval is always last.
- All computers, peripherals, and software must be created on a **Technology Requisition**.

U.S. Mail

FOR ALL MAILINGS you must submit a "Request for Central Administration of U.S. Mail" (form #40-20372). It must have your budget code, authorized signature and number of pieces being mailed and must go through the Mail Room at Serna.

All mail being returned from the Post Office is now being charged by the Post Office at full price "First Class" rate. **The return fee will be charged to your budget code**. This includes using Metro Mail and other outside mail services. Please update your student/parent or employee addresses to avoid these extra charges.

NOTE: All mail processed through the Mail Room at the Serna Center is charged to the department/site. This includes all cumulative folders being sent and all returned mail (letters and postcards)

Chargeback Requisitions

*Note: All vendor requisition types can be created using the below process.*

Chargeback requisitions are used to set up a budget account that your online purchases and copier charges can be "charged back" to after the District has paid the bill in full. They can be increased or decreased as needed. Chargeback requisitions should only be used for the following vendors:

Home Depot (SupplyWorks)	**Vendor #313076**
Office Depot	**Vendor #113902**
Ray Morgan Copier	**Vendor #308700**

To create a new Chargeback requisition you will need to fill out the **REQUISITION, ITEMS** and **ACCOUNTS** tabs.

- In Escape, under the "**Finance**" section click on "**Requisitions**" then on "**Vendor Requisitions**."
- From "**Vendor Requisitions**" click "**New**" and choose "**Chargeback**"
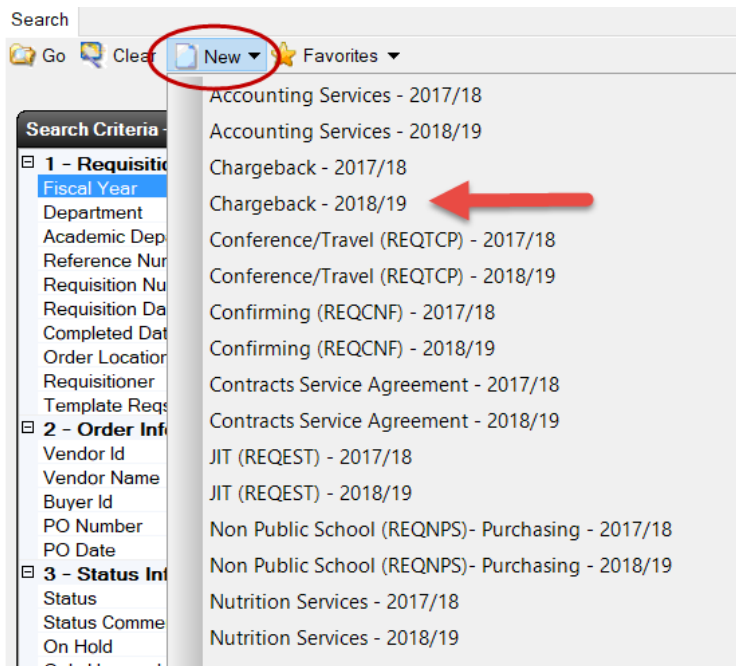
- On the first tab, which is the **REQUISITION** tab, you will need to enter or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.** For most users, the location fields will default to the user's location. Only change the location code if you want your order delivered elsewhere.
- **VENDOR ID** enter six-digit vendor ID number.

| Requisition | Items | Accounts | Payments | Quotes | Approvals | Assets | Attachments | Notes | History |

Requisition/Vendor Information

⊟ 1 - Requisition Information

Dept Id	🔒 CHRGBCK {Chargeback}
Academic Department	
Requisitioner	Dan Sanchez
Request Date	7/26/2018
Order Location	**0830 {PURCHASING SERVICES}** ←
Delivery Location	**0830 {PURCHASING SERVICES}** ←
Room	
Comment	**Chargeback for Custodial Supplies** ←
Responsibility	
Category	
Goods and Services Category	

⊟ 2 - Vendor Information

Order Type	Blanket PO
Online Order	🔒
Online Order Contact	
Vendor Category	
Vendor Id	🔖 **313076 {INTERLINE BRANDS INC}** ←
Vendor Address Id	1
Vendor Name	🔒 **SUPPLY WORKS**
Street Address	🔒 **230 HARRIS AVE UNIT 11**
City State Zip	🔒 **SACRAMENTO, CA 95838**
Phone / Fax	🔒 **(916) 923-5039 x0 / (855) 329-2532**
Allows Emailing POs	🔒 **No**
Quote Number	

⊟ 3 - PO Information

- Next, click the **ITEMS** tab.
- From **ITEMS** click "**New**"

| Search | List | Form |

🔍 ▼ | 🗑 Delete | ◀ Prev | ▶ Next | 📁 Close | 🚫 Cancel | ☑ Tasks ▼

Req# CH19-00340, PO# , FY 2019 {2018/2019}, Status: Open

| Requisition | Items | Accounts | Payments | Quotes | Approvals | Assets | Attachments | Notes | History |

📂 Open | 📄 New | 📑 Export | ☑ Tasks ▼

Line	Qty	Unit	Description	Unit Price	Extended Cost	Asset	Qty Rcvd	Date Rcvd	Qty To Rcv	Catalog #	Stores #

- Enter **Order Quantity: 1, Order Unit: Each, Unit price: the not-to-exceed amount** and **Taxable: No**"
- Below is an example of the verbiage to include in the **"Description"**:
  BLANKET ORDER WITH OFFICE DEPOT FOR THE (INSERT CURRENT YEAR HERE) SCHOOL YEAR. NOT TO EXCEED $XXXX
  If the chargeback is for a specific program or office within your site/department please include that information in the description.

- **SAVE/CLOSE** the **ITEMS** tab before you move on to the next tab.
- For custodial supply requisitions only, **SAVE/CLOSE** the requisition and notify your **Custodial Operations Supervisor** of the requisition number. They will complete your requisition and submit to Purchasing for processing.
- Next click the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"
- Add the budget code(s)
- **SUBMIT the requisition by clicking the Task drop down menu and   selecting "Submit"**

Chargebacks in "**Ready for Payment"** status that have a PO prefix of "**CHB**" have been processed and are ready to use for online purchases.

Purchasing Requisition / Blanket Order

Blanket requisitions are Purchasing requisitions with "Blanket PO" as the "Order Type." These requisitions are used like a checking account. You create a "Blanket" requisition for goods that you order frequently, or for something that you are billed for on a recurring basis such as water service, transportation services, postage machine bills, etc.

To create a new Blanket requisition, you will need to fill out the **REQUISITION, ITEMS**, and **ACCOUNTS** tabs. Under the "**Finance**" section click on "**Requisitions**" then on "**Vendor Requisitions**." From "**Vendor Requisitions**." Click "**New**" choose "**Purchasing**"

- On the first tab, which is the "**Requisition**" tab, you will need to have your **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.** The comment should say something like "BLANKET ORDER FOR ART SUPPLIES"
- **Change the Order Type to Blanket PO**. (Section #2)
- Next, click **ITEMS** tab.
- From **ITEMS** click "**New**"
- Enter **Order Quantity: 1, Order Unit: Each, Unit price: the not-to-exceed amount** and **Taxable: No**"

- Below is an example of the verbiage to include in the **"Description"**:
  BLANKET PURCHASE ORDER
  RENTAL OF HOT/COLD WATER DISPENSERS & WATER SERVICE
  2022-2023 SCHOOL YEAR
  VALID FROM: 07/01/2022 TO 06/30/2023
  NOT TO EXCEED: $XXXX
  ACCOUNT NO. 0123456789
- **SAVE/CLOSE** the line item before moving on to the next tab.
- Next click the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"
- Add the budget code.
- **SUBMIT** the requisition by clicking the Task button and selecting "Submit"
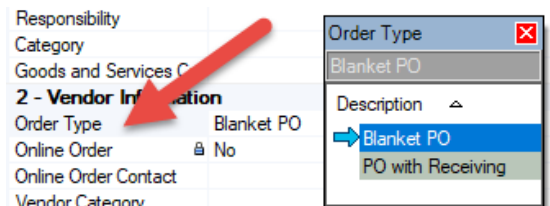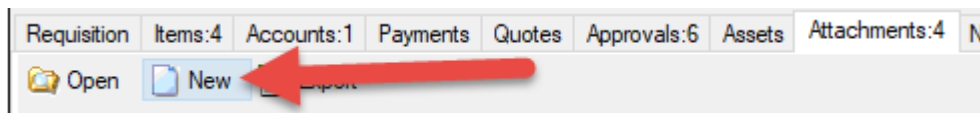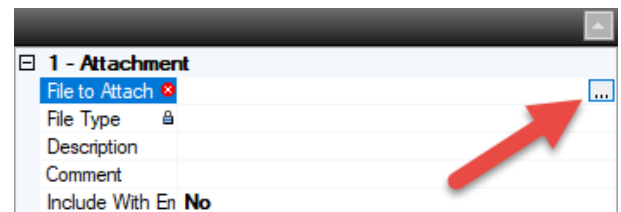
Confirming Requisition

Confirming requisitions are used to pay a vendor or reimburse staff for an item or service that has already been received. Confirming requisitions are for items or services totaling **$400.00** or less. To pay for confirmed/received orders that **exceed $400.00** follow the same process as below using a Purchasing requisition. Back-up documentation must be attached to the requisition (receipts, invoices, etc.) **ALL DOCUMENTATION MUST BE SIGNED BY AN ADMINISTRATOR AND ATTACHED TO THE REQUISITION.**

To create a new Confirming Requisition, complete the following tabs: **REQUISITION, ITEMS**, **ACCOUNTS** and attach documentation in the **ATTACHMENTS** tab.

- From "**Vendor Requisitions**." click "**New"** and choose "**Confirming"**
- On the "**Requisition**" tab, enter or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID. If over $400.00 and using a Purchasing requisition, be sure the COMMENT includes "TREAT AS CONFIRMING".**
- Next Click **ITEMS** tab.
- From **ITEMS** click "**New"**
- Enter **Order Quantity: 1, Order Unit: Each, Unit price**: **the amount of the invoice/receipt.** A line item for each invoice/receipt is required. If there is an invoice, the line item description should reference the invoice number. Click SAVE/NEW for additional line items.
- **SAVE/CLOSE** the last line item before moving on to the next tab.
- Next click the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"
- Add the budget code.
- Next click the **ATTACHMENTS** tab.
- From **ATTACHMENTS** click **"New"**

- Click the square with the three dots, find and attach the document(s).
- **SAVE/CLOSE the** attachment
- **SUBMIT** the requisition by clicking the Task button and selecting "Submit"

Purchasing Requisition

Purchasing requisitions are the most commonly used, they are the standard requisition type. Examples of the commodities are: sports equipment, office supplies, novels and subscriptions.

To create a purchasing requisition, complete the **REQUISITION, ITEMS**, and **ACCOUNTS** tabs.

- From "**Vendor Requisitions**." click "**New"** and choose "**Purchasing"**
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- Next, click the **ITEMS** tab.
- From **ITEMS** click "**New"**
- Enter the **Order Quantity, Order Unit, and Unit Price** for each item being ordered, clicking **SAVE/NEW** to add additional items. The Description should contain the item's description and item number (SKU, UPC, ISBN, etc.)
- **Quotes** from vendors should be added to the **ATTACHMENTS** tab. Orders meeting certain thresholds require quotes to be obtained, please see the **Limits for the Procurement of Goods and Services** matrix on page 28. If quotes are required, *screen print outs of web pages and/or shopping carts are not acceptable*.
- Please use notes tab to add any additional information regarding the order.
- **SAVE/CLOSE** the last line item before moving on to the next tab.
- Next click the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"
- Add the budget code.
- **SUBMIT** the requisition by clicking the Task button and selecting "Submit".

Technology Requisition

Technology requisitions are used when purchasing computers, computer peripherals and accessories, software/app licenses, downloadable content, etc.

To create a Technology requisition, follow the same process as other requisition types, and fill out the **REQUISITION, ITEMS**, and **ACCOUNTS** tabs.

- From "**Vendor Requisitions**." click "**New"** and choose **"Technology"**
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- Next, click the **ITEMS** tab.
- From **ITEMS** click "**New"**
- Enter the **Order Quantity, Order Unit, and Unit Price** for each item to be ordered, clicking **SAVE/NEW** to add additional items. The description should include the item's description and item number if applicable (SKU, UPC, ISBN, etc.). Line items that say "SEE ATTACHED LIST" will be returned to open for correction by the site/dept.
- **Quotes** from vendors must be added to the **ATTACHMENTS** tab. ALL requisitions must match the attached quote. (allocation, quantity, shipping, tax)
- **SAVE/CLOSE** the last line item before moving on to the next tab.
- Next click the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"
- Add the budget code.
- **SUBMIT** the requisition by clicking the Task button and selecting "Submit"

NOTE: All the technology requisitions require the approval of the Chief Information Officer. Please allow extra time when ordering.

Contracts Service Agreement Requisition

Contracts Service Agreement (SA) requisitions are used for personal or professional services such as: direct services to students, professional development, and entertainers/speakers as well as consulting or advice from specially trained independent contractors. They are not used for non-professional services such as maintenance or repair of equipment, nor are they used every time there is an agreement which may be the case for goods or software, for instance, which would use Purchasing and Technology requisitions, respectively.

To create an SA requisition, complete the **REQUISITION, ITEMS**, **ACCOUNTS,** and **ATTACHMENTS** tabs.

- From "**Vendor Requisitions**." click "**New"** and choose "**Contract Service Agreement"**
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- Next, click the **ITEMS** tab.
- From **ITEMS** click "**New"**
- **Order Quantity** is typically "1" but it could also be the number of hours or months of service or the number of installments the services will be paid in.
- **Order Unit** defaults to EACH or it may be changed to HOURS, MONTHS, etc.
- **Unit Price** could be the total contract amount, the hourly or monthly rate or installment amount, the cost of each component of the service, etc.
- **Description** should include a detailed description of the services being provided, the dates the services are being provided and any other pertinent information such as the titles of professional development courses or workshops, or the number of people attending a training. For each item being ordered, click **SAVE/NEW** to add additional items.
- A quote/estimate/proposal should be added to the **ATTACHMENTS** tab. Contracts meeting certain thresholds require quotes to be obtained, please see the **Limits for the Procurement of Goods and Services** matrix on page 28. The Contracts Office will draft written agreements for services over $20,000. **SAVE/CLOSE** the last line item before moving on to the next tab.
- Next click the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"
- Add the budget code.
- **SUBMIT** the requisition by clicking the Task button and selecting "Submit"

Warehouse/Stores Requisition

Stores Requisitions are used to order supplies from the Warehouse. Items currently stocked in the warehouse include PPE such as masks, gloves, hand sanitizer, signs and other supplies needed for the mitigation of COVID-19.

To create a Stores requisition, complete the **REQUISITION, ITEMS**, and **ACCOUNTS** tabs.

- From the Requisitions menu select "**Stores Requisitions**" and click "**New**"
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCATION,** and **COMMENT.**
- Next, click the **ITEMS** tab.
- From **ITEMS** click "**New**"
- Enter the **STORES ITEM #** by typing 99 (PPE) and then clicking the drop down arrow. A list of personal protection equipment and supplies will appear. Double click an item to add it to the requisition. Enter the quantity in the **ORDER QUANTITY** field.
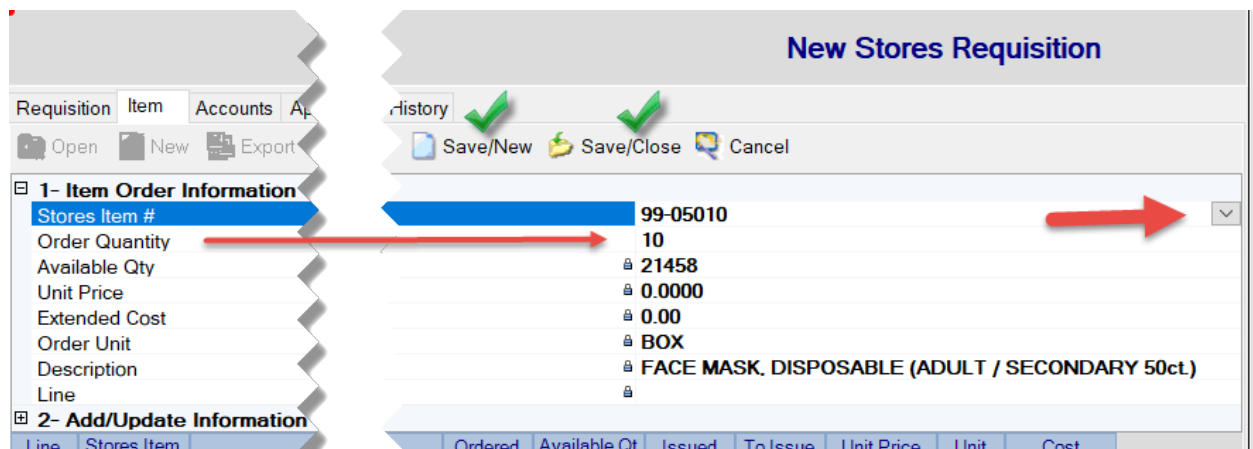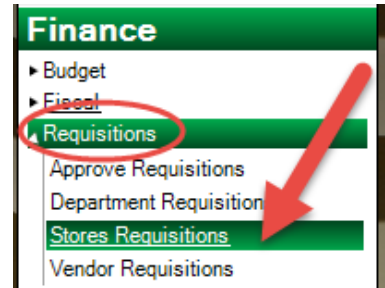
- Continue clicking **SAVE/NEW** to add additional items. Click **SAVE/CLOSE** once the last item is entered.
- Because PPE is being distributed at zero cost to the sites, at this point the requisition may be **SUBMITTED** without adding an account by clicking the Task button and selecting "Submit".
- If you receive an error and are unable to Submit the requisition without an account, click on the **ACCOUNTS** tab.
- From **ACCOUNTS** click "**New**"

- Add any general fund budget code. **The site will not be charged.(PPE)**
- **SUBMIT** the requisition by clicking the Task button and selecting "Submit"**.**
- Once Submitted the requisition will automatically change to Approved status. The Warehouse will gather the order for delivery on the site's next delivery day.

This example was for the purchase of PPE. If other "Store" items are selected, there will be a cost associated with these items.

How to Copy a Requisition

- Click on the Requisition to copy (it will be highlighted blue)
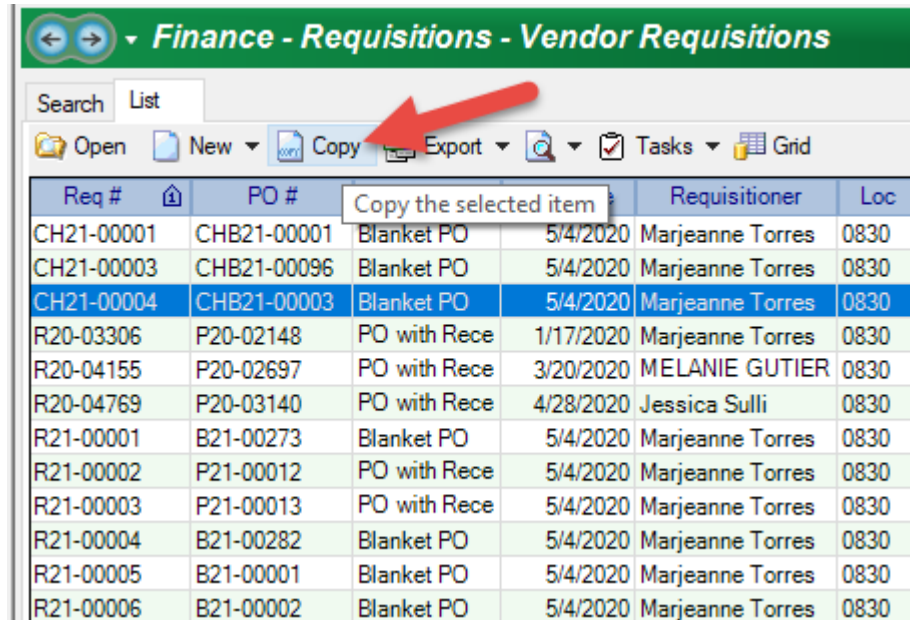
- Click the "**Copy**" button which is the third icon from the left.
- When "**Copy**" is selected a prompt may pop up asking to select the year for the NEW requisition.
- Edit each field, update information (especially dates), quantity and/or description, ensure budget line is correct, notes are added (including justification) and submit the requisition.

How to Receive Online (ROL) a Requisition

When an order is delivered directly to your site/dept., rather than being received centrally at the Warehouse, the site/dept. is responsible for posting receipts in Escape. This process is called "Receiving Online" or ROL for short. Receiving Online is required for Purchasing, Technology, Textbook, and Contracts Service Agreement (SA) requisitions (these requisitions will all list the **Order Type** as **"PO with Receiving"**). Receipts can only be posted for requisitions in **Printed or Ready for Payment status**.

To ROL a requisition follow these steps:

1) Ensure the requisition you are attempting to ROL is not open in the Vendor Requisitions activity.

2) In the Activity Tree click **Finance> Purchasing>Receive PO Items**.

3) Under **"Receipt #1"**, enter the date the order was physically received at the site in the **"Date Received"** field. If nothing is entered in this field it will default to the current date listed at the top of the form. This is especially important if you are receiving online on 7/1 or after for an order that was delivered on 6/30 or prior. During year-end (July and August), the account is charged in the year that receipt is dated.

4) In the **"Reference Number"** field enter either the requisition number or the purchase order number.

5) In the **"Receive All"** field leave the selection as **No** if you only want to receive part of the order, or change it to **Yes** if you want to receive the entire order.

6) Click **"GO"**

7) If you selected **"Receive All"** as **Yes**, skip to step 8. If you selected **"Receive All"** as **No**, click in the **Rcv Now** field for the line(s) you want to receive and enter the quantity you received. Repeat for all lines as applicable.
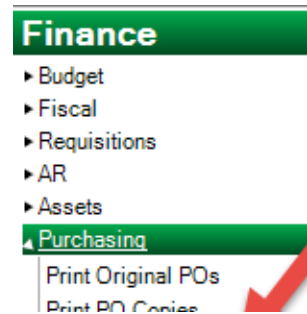
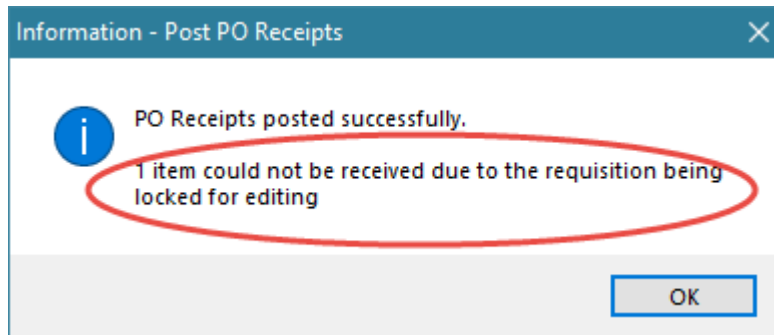| Req Number	PO Number	Vendor Name	Item	Ordered	Received	Rcv Now	Date Rcvd
R22-00490	P22-00113	FOLLETT SCHO	1	80	0	37	8/13/2021
R22-00490	P22-00113	FOLLETT SCHO	2	180	0	0	8/13/2021

8) Click Task and select Post.

9) A prompt will popup indicating how many lines are being updated. Make sure it is correct and click OK.

10)   Pay careful attention to what the next popup dialogue box says.
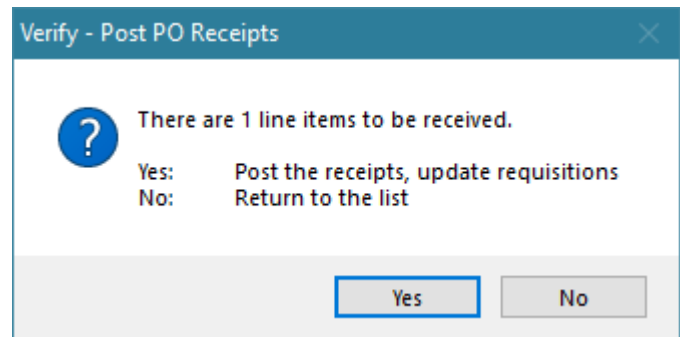
It may indicate the receipts were not posted successfully. The message in the image below shows the item was not received because the requisition was locked for editing. This means the requisition was open in the **Vendor Requisitions** activity and should be closed and the ROL processed again.

Verify - Post PO Receipts

? There are 1 line items to be received.

Yes: Post the receipts, update requisitions
No: Return to the list

Yes   No

Information - Post PO Receipts

i PO Receipts posted successfully.
   1 item could not be received due to the requisition being locked for editing

OK

11)   Once you receive a dialogue box that shows the receipts posted successfully the process is complete. If the requisition was in **Printed status** it will now be in **Ready for Payment status**.

Information - Post PO Receipts

i PO Receipts posted successfully.

OK
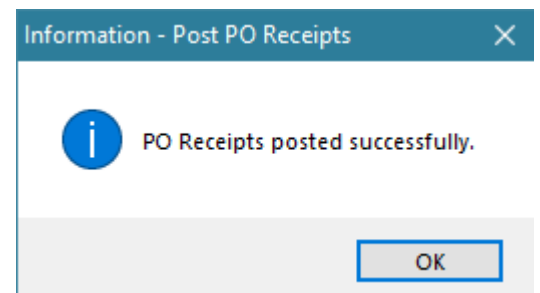
Requisition Process FAQ

1. **Who creates my requisitions? Is it the site's responsibility?**
   - Yes, this is the site's responsibility to create and submit their requisitions. Note: Remember to check the status of all your requisitions frequently, and follow-up with the appropriate department.

2. **What does the requisition status mean?**

Open	Requisition is being prepared and has not been submitted for approval.
Submitted	Requisition has been submitted, and is awaiting approvals. See **APPROVALS** tab for the list of approvers.
Approved	Requisition has been approved, and will be reviewed by Purchasing in the order received. When processed, Purchasing will generate a purchase order number.
Printed	Purchase order has submitted to the vendor. Please allow 14-21 business days for delivery. **Please remember to "ROL" or Receive on-line** if the order is delivered directly to your site/dept.
Ready for Payment	Products and/or services have been received. Invoices should be turned in to Accounts Payable if received by your site/dept.
Complete	Products and services have been received, and all invoices have been processed against this order.

3. **Who approves the requisitions?**
   - Categorical Staff, when applicable
   - Budget Department (Fund Specialists, Supervisor)
   - Assistant Superintendent and CBO if over $5,000
   - Technology Services (Technology requisitions only)
   - Literacy and Curriculum (Textbook requisitions only)
   - Purchasing Department for final approval on all requisitions
   - Purchasing Review Committee (PRC) approves requisitions based on certain criteria outside of Escape. The Buyer will facilitate this process.

4. What does Purchasing do with the requisitions?
- Purchasing reviews to check for accurate descriptions, product numbers, cost, delivery location, and that preferred vendors are used
- Ensures bidding and quotation requirements in District policy, Ed. Code and Public Contract Code are met
- Prints the Purchase Order and sends it to the vendor (by email)

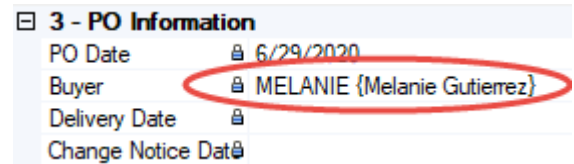**5. How do I increase my Office Depot Chargeback?**
- Please submit a request to Purchasing via email to melanie@scusd.edu. Include: Chargeback number, increase amount, and what budget code(s) to use. The process is the same for any Chargeback or Blanket Order.

6. How do I check the status of my order?
- Please contact Purchasing to assist you in the status of your order. (if the requisition is in Printed status)

7. How do I return or exchange products?
- Please contact the Buyer that processed your order. They will assist you with the process, and act as the "liaison" between your site/dept. and the vendor.

8. How do I make adjustments to my travel and/or cancel?
- Please contact Purchasing as soon as possible at 916-643-9460.

Warehouse Services

a) Warehouse Services:
  i) Mail delivery:
    (1) Interoffice mail:
      (a) Food, interoffice mail and freight are scheduled for daily delivery (freight may be delayed on days with higher volume of food). Children's Centers have assigned days that they are serviced. Unions are to be picked up and or delivered as requested only. If the school/ site should have mail for the Unions, there will be no interruption; it will be delivered the next working day.
  ii) County Mail:
    (1) County mail directories can be purchased thru the Sacramento County Office of Education print shop department. You can also access the same directory online by searching Sacramento County Office of Education Public School Directory.
      (a) All county mail (non-district mail) must have the Districts name clearly labeled on the front of the package. If the school/ site are not shown in the directory, it will have to be sent by USPS. Please keep in mind that West Sacramento Schools are Yolo County and will have to be sent USPS.
  iii) Student Cumulative Files:
    (1) When processing files to transport within the District, please butcher wrap and or box items using box tape to properly secure items. No CUMS will be picked up loose. All boxes must have lids and secured to the box for transport. The school to which you are sending to must be printed clearly on top of the box.
    (2) Drivers have a schedule to which they maintain and adhere to. If you think that your outgoing mail should require a hand truck, please contact the Warehouse so that the driver can be prepared and help to expedite the delivery.
b) E-waste
  i) Obtain the proper forms for recording the itemized equipment for surplus. You may find the form WHS-F004, by going onto the Districts intranet and using the search box, type WHS-F004, once populated, you may download the forms and enter on the computer or print and manually enter the required information (please write clearly for numbers can easily be transposed as letters).

ii) All e-waste must have the approval from the board to be picked up from the warehouse for surplus.

iii) Submit completed forms for approval to the Warehouse Supervisor, by email, fax, or interoffice mail box 835.

iv) Once approved, the Warehouse will contact the site to schedule a pick up:

(1) All equipment must be palletized. If you do not have available pallets, please contact the Warehouse to have empty pallets dropped at your location.

(2) Please make sure that the product is in a location that can be accessible by pallet jack for pick up. If product is elsewhere on campus, the plant manager and or staff are required to assist the warehouse to load pallets to help expedite the pickup for the drivers are on a timely schedule and have other sites to meet deadlines.

Please note: No district property is to be given away or donated, this includes: computers, TV, projectors, monitors, etc. Please call Purchasing Services for any questions.

c) Universal Waste:

i) Universal waste is now administered by Risk Management.

(1) You may obtain the procedures, labels, and request for pick up forms by using the Districts intranet and typing in the search box, Universal waste.

(2) Once all documentation has been completed, contact Risk Management at box 840 or Fax the completed request by dialing 399-2071. The Risk Management staff will schedule the pickup.

d) Request for pick up:

i) If you wish for the Warehouse to transport any equipment to other sites, the request for services form (PUR-F001) must be filled out and emailed/ faxed/ or sent thru interoffice mail to the Warehouse, box 835 for scheduling. No product will be picked up without paperwork. The more information provided will help expedite processing.

e) Asset Tagging

i) All Sacramento City Unified School District assets with a value of $500.00 or more must be tagged with an SCUSD asset tag. In addition, all Chromebooks and tablets must be asset tagged even if they are valued less than $500.00. This allows the District to keep an accurate inventory as required by Education Code and to comply with GASB34 requirements by the state.

ii) When an item is received at the Warehouse and it meets the criteria for asset tagging, the Warehouse staff will record the serial number and model and enter this information into Escape. If you have an item needing an asset tag, please contact Jason Holland, Warehouse Supervisor at 916-395-4186 ext. 460310 or email Jason-holland@scusd.edu for further instructions.

LIMITS FOR PROCUREMENT OF GOODS AND SERVICES

	MULTIPLE SUPPLIERS		PUBLIC CONSTRUCTION PROJECTS
	GOODS	**SERVICE**	
Requisition Quote	**$250-$7,499**	**$250 - $7,499**	**$0 - $7,499**
(2) Phone/Fax Quotes	**$7,500 - $19,999**	**$7,500 - $19,999**	**$7,500 - $19,999**
(3) Written Quotes	**$20,000 - $99,100**	**$20,000 - $99,100**	**$20,000 - $60,000**
Informal Bidding Public Works (PCC22032)*	-	-	**$60,001 - $200,000**
Formal Bidding Labor (PCC20112)*	-	**>$99,100**	-
Formal Bidding Material & Supplies (PCC20112) & Public Works (PCC22032)*	**>$99,100**	-	**>$200,000**
Limited Specialty Suppliers	None Required	None Required	

Specialty Suppliers	Goods	Service	Public Works
• Perishable Foods • Textbooks • Specific Curriculum • Single Source • Utilities • Sanitation	• Arts & Craft Supplies • Computer Equipment/Supplies • Custodial Equip/Supplies • Sports Equipment • Furniture • Vehicles	• Refrigeration Repair • Routine/Recurring Work • Vehicle Repair • Minor Repainting • Landscape Maint. • Equipment Maint.	• Construction • Reconstruction • Alteration • Renovation • Improvement • Demolition • Repair Work • Roofing • Painting • Electrical

*Contracts require Board of Education approval prior to start of work.

WHEN IN DOUBT PLEASE

Contact Us

Your Purchasing TEAM,

Thank you!