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**PURCHASE ORDER REQUISITION APPROVAL (BUD-P005)**  
Sacramento City Unified School District

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**1.0 SCOPE:**

- 1.1 This procedure discusses how to process on-line requisition approvals in Sacramento City Unified School District.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

**2.0 RESPONSIBILITY:**

- 2.1 Budget Department

**3.0 APPROVAL AUTHORITY:**

Approved signature on file

- 3.1 Budget Director

**4.0 DEFINITIONS:**

- 4.1 P.O. – Purchase Order
- 4.2 Req. # - System assigned number when requisition is created.
- 4.3 P.O. # - System assigned number when purchase order is printed.
- 4.4 Status:
  - 4.4.1 Open – The requisition has not yet been submitted for approval.
  - 4.4.2 Submitted – The requisition has been submitted for approval, but not yet approved.
  - 4.4.3 Approved – The requisition has been approved.
  - 4.4.4 New Receipts – Line item receipts have been recorded.
  - 4.4.5 Needs ROL – Need to receive items on-line.
  - 4.4.6 On Hold – Requisition has been placed on hold, reason should be identified in the notepad of the requisition.
  - 4.4.7 Partial Pay – Part of the requisition has been paid.
  - 4.4.8 Print Change – A change to the original purchase order has been printed.
  - 4.4.9 Closed Out – The requisition has been completed.
  - 4.4.10 Cancel – The requisition has been cancelled.
- 4.5 Funding – Account code to be charged.
  - 4.5.1 Billable – funding to come from an outside vendor. Invoiced by the accounting department.
- 4.6 Notepad – (Alt+N, F10) On line blank page tied to requisition.
- 4.7 Assurance Statement – Vital Sign, Core Strategy, Page Number Referring to School Site Plan
- 4.8 Requisitions:

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- 4.8.1 Computer – To acquire computer hardware and related items, but not software programs.
- 4.8.2 Blanket Order – To cover continual charges from a vendor during a single school year.
- 4.8.3 Regular Buy Out (Purchase Orders) – To acquire merchandise or services from a vendor.
- 4.8.4 Textbook – To acquire State/Board adopted core curriculum materials.
- 4.8.5 Service Agreement - To acquire unique, limited and one-time kind of service(s). Such as, Presenters, Speakers, Trainers, Consultants. (Cannot be used for district employees)

**5.0 PROCEDURE:**

- 5.1 Requisition is entered into Escape by the site.
- 5.2 Pull up approval list or individual requisition.
- 5.3 Review line item(s) for description.
- 5.4 Confirm requisition type is appropriate.
- 5.5 Verify that funding is appropriate/allowable/available.
  - 5.5.1 If billable account, as defined by resource, snapshot to General Accounting.
  - 5.5.2 Verify account components are correct; verify object, goal and function.
- 5.6 Review notepad/templates for notes, vital signs, additional information, etc.
- 5.7 Confirm appropriate use of sales tax and/or shipping charges.
- 5.8 Make note of any necessary changes made to the requisition or any comments in the notepad.
- 5.9 Approve requisition.
  - 5.9.1 Option keys for approval – Ctrl+N, Alt P, A, F3.
- 5.10 Cycle is completed in Escape and automatically forwarded to the Purchasing Dept.

**6.0 ASSOCIATED DOCUMENTS:**

- 6.1 SACS Code Book
- 6.2 Budget Process Handbook
- 6.3 Accounting Manual
- 6.4 Grant Award Information

**7.0 RECORD RETENTION TABLE:**

**8.0 REVISION HISTORY:**

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<u>Date:</u>	<u>Rev:</u>	<u>Description of Revision</u>
11/12/04	A	Initial Release

**\*\*\* End of procedure \*\*\***