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## PURCHASE ORDER PROCESS (PUR-P001)

Sacramento City Unified School District

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### 1.0 SCOPE:

- 1.1 This procedure discusses the process that is used to process purchase orders over \$50.00 for the purchase of supplies, equipment, furniture and instructional materials for the Sacramento City Unified School District.

### 2.0 RESPONSIBILITY:

- 2.1 Purchasing Buyer/Supervisor

### 3.0 APPROVAL AUTHORITY:

- 3.1 Director of Purchasing \_\_\_\_\_  
Signature \_\_\_\_\_  
Date

### 4.0 DEFINITIONS:

- 4.1 JIT: Just-In-Time
- 4.2 RFQ: Request for Quotation
- 4.3 PCC: Public Contract Code

### 5.0 PROCEDURE:

- 5.1 Requisition Types:
  - 5.1.1 Purchase Order Requisition
  - 5.1.2 Computer Equipment Requisition
  - 5.1.3 Blanket Order Requisition
  - 5.1.4 Textbook Requisition
  - 5.1.5 Public Construction Requisition
  - 5.1.6 Services Agreement Requisition
  - 5.1.7 JIT Requisition
- 5.1 School sites and departments creates, submits and encumbers an Escape on-line requisition for supplies, equipment, furniture, professional services, public works projects, educational and instructional materials.
  - 5.1.1 The on-line requisition will not allow submittal unless funds are available.
- 5.2 Approvers listed on the electronic requisition will approve the requisition on-line.
- 5.3 Purchasing Services processes the requisition when it is in the "approved" status.
  - 5.3.1 Purchasing Limits
    - 5.3.1.1 \$250 - \$7,499: No competitive quotes

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5.3.1.2 \$7,500 - \$19,999 – minimum of 2 phone or fax quotes

5.3.1.3 \$20,000 - \$72,399 – minimum of 3 written quotes

5.3.1.4 \$72,400+ - formal bid

5.3.2 Instructional Materials are not required to quote per PCC.

5.4 Purchase Order is printed

5.4.1 Purchase Order is burst, separated, distributed, and filed

5.4.2 Original Purchase Order

5.4.2.1 Signed by the Purchasing Director

5.4.2.2 Either mailed or faxed to the vendor

#### 6.0 ASSOCIATED DOCUMENTS:

6.1 Limits For The Procurement of Goods and Services

6.2 RFQ responses

6.3 Hard Copy Purchase Order

6.4 Electronic Copy Purchase Order

#### 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
RFQ responses	File cabinet in Purchasing	5 years	Discard as desired	Secured Warehouse
Hard Copy Purchase Order	File cabinet in Purchasing	5 years	Discard as desired	Secured Warehouse
Electronic Copy Purchase Order	District Network	5 years	Discard as desired	Secured Information Services/ Serna Center

#### 8.0 REVISIONS:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
12/13/04	A	Initial release
06/06/06	B	Revise records retention table
11/28/06	C	Revise 5.3.1.4 & 5.3.1.5 and add 5.1
10/23/07	D	Revise Purchasing Limits, 5.3.1
03/27/08	E	Revise 5.3.1.3 & 5.3.1.4