

## JORDAN PUBLIC SCHOOLS PURCHASING PROCEDURES

**All purchases need to have prior approval and a purchase order from SMART (Region) before any purchases are made.**

Below are the new procedures that should be followed:

1. Staff complete [PURCHASING REQUEST FORM](#) – (found on District Website under Staff Links) and submits form to building administrative assistant - requests should include detail listing of all items that are being purchased.
2. Administrator Assistant enters PO information into REGION (SMARTer Finance) and routes for the proper approval to administrator for approval
3. Once approvals have been met, administrative assistant will then print out purchase order
4. Administrative assistant will place the order –via credit card (online or phone) or fax/mail po to get invoiced at a later date.

### Items to be aware of:

- Purchase orders are not needed for purchases made from a local merchant where the school district has a charge account - staff member just needs to make sure the administrator is aware of the purchase.
  - Rademacher's
  - Ace HardwareStaff member will need to turn detailed receipt in to Administrative Assistant immediately upon return.
- Budget Account codes need to have funds available before purchase order will be approved. If funds are not available in account code - a budget transfer will need to be done from an account code that has funds available.
- The purchasing procedures also need to be followed for purchases made with the district credit card.
- Purchases made with the District Credit Card should be done by the building administrative assistant or administrator – purchaser will need to ensure that sales tax **is not** charged. If sales tax is charged, it will be the purchaser's responsibility to get those \$'s refunded, or to reimburse the district that amount.

- If a staff member wishes to take the credit card to a store, such as Walmart, JoAnn Fabrics, etc. the purchasing process still needs to be followed before making the purchase; staff should use an estimated dollar amount when filling out request. Receipts need to be turned into the Administrative Assistant immediately upon return. It is best practice to get a Sales Tax Exempt form to take with to the store.
- Please note that it is not appropriate or acceptable for any employee to write down the number of the credit card to be used for later purchases as this compromises card security.
- Purchases made with the district's Amazon account need to have a purchase order first. If a purchase order # is not entered on the Amazon order, Nicky, Accounts Payable, has the authority to cancel that order.

The reason for these procedure changes is to have staff and administration more aware of their budgets and also where their budget dollars are being spent. No items should ever be purchased without prior approval.