

PURCHASING GUIDE

Purchasing Guide by Dollar Amount When making any purchase you should always attempt to use an Approved Vendor First	
< \$3,500	If no approved source exists, you may select the most economical source and proceed. If an approved source exists, you must attach quotes or an explanation for selecting a non-approved source.
\$1,000 - \$49,999	If using an unapproved vendor, three written quotes must be provided. Depending upon the type of purchase, a formal RFP may be required at the discretion on the Director of Purchasing.
> \$50,000	Requires a formal bid process and requires approval from the Board.

Finding a Vendor

Step 1: Look at appropriate Bid Tabulation.

- Listed on PFISD Website (not Intranet) under Departments -> Purchasing -> Current Contracts.
- If the item you are purchasing is specifically listed in the Bid Tab, purchase from the Vendor to whom the item was awarded as they submitted the lowest bid.
- If the item is not listed in the Bid Tab, you may use any approved vendor for that bid (usually highlighted at top of Bid Tab).

Step 2: Enter a Purchase Order Requisition

If possible, include the Bid Number and a Commodity Code. (If no bid number appears in the drop down box, the vendor may be unapproved. Contact Purchasing if over \$3500)

- If multiple vendors exist with the same name, verify you are using the correct vendor by checking the vendor page in Focus.
- Make sure there are funds in the account before you enter a Requisition. The system will not allow it to process with a negative balance.

THINGS TO REMEMBER:

1. Try to use an approved vendor at all times.
2. You may use an unapproved vendor for purchases under \$3,500 **if no approved source exists.**
3. If you spend over \$3,500 and are using an unapproved vendor, you must provide 3 quotes. We must have these quotes before we can approve your Requisition.
4. Requisitions over \$5,000 will go to Deputy Superintendent and over \$25,000 will go to the Superintendent and Director of Purchasing for approval. Purchases over \$50,000 must be approved by the School Board, unless previously approved in some manner.
5. If you are buying something out of pocket and want to be reimbursed, the purchase must be under \$50.00 and a Pre-Approval for Reimbursement Form must be approved before you make the purchase and attached to your Payment Voucher in Focus. If more than \$50.00 is spent, the overage will not be reimbursed unless it is approved by the principal and is not more than a few dollars.
6. When submitting a Not-To-Exceed Requisition, a list of items to be purchased must be included. The Requisition will not be approved without this list. You may include it on the Requisition under Item Description or attach the list in the Files box of your Purchase Request in Focus. Example: Office Depot. Do not include any items requiring tech approval in any itemized list. (keyboards, monitors, printers, etc.) These items must be listed individually on the requisition.
7. Just because a Vendor is Active in the Finance System, it **does not** make them an Approved Vendor.
8. Sole-Source Letters- If a vendor is the sole provider of the product or service, a signed and dated Sole-Source Letter must be provided to us. Sole-Source letters are only good for one-year.
9. Adding Vendors: - forms online- complete all forms. If individual, must send HR approval with forms.
10. Contracted Service Providers – must go through the same PO process as all other vendors/services. Verify if HR approval, quotes, or bid process is required prior to beginning service. All contracts must be approved by the Director of Purchasing BEFORE services can be scheduled.

IF YOU HAVE ANY QUESTIONS OR NEED ADDITIONAL HELP, PLEASE FEEL FREE TO CONTACT US.

JANIE ORNELAS – 594-0074 (Technology, Athletics and Food Service)

Guadalupe.ornelas@pfsd.net

TAMARA BERDING – 594-0072 (Middle and High Schools and Fine Arts)

Tamara.Berding@pfsd.net

NICOLE AYER – 594-0075 (Elementary Schools, Support Services and Furniture)

Nicole.ayer@pfsd.net

SYLVIA D TAPPIN-594-0089 (Admin., CTE, EDP, SPED)

Sylvie.Tappin@pfsd.net