Purchasing Procedures

Here is a written explanation of the Polson School District Purchasing Procedures. There are a few different ways to order supplies or request services for the District please see the following:

Option 1: Purchase Orders:

1. Please contact the Vendor and get a Price quote on the cost of goods or services (an estimate is fine). DO NOT ORDER UNTIL YOU RECEIVE A PO #.
2. Fill out Requisition Order (RO) and have the SUPERVISOR approve. See below an example of a Requisition. These are on our website and in every School office.

Polson School District 23 — **REQUISITION**
School Administration Building
Polson MT 59860

Paid On CC
DATE: P.O.#

SCHOOL:
DEPT.:
BUDGET #:

QUANTITY	CATALOG NUMBER	DESCRIPTION: (Color, size, level, edition, etc.)	UNIT PRICE	TOTAL COST
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
		Subtotal:		$ -
		Shipping: (enter percentage, i.e. .08)		$ -
		Total:		$ -

Vendor:
Address:
Phone: Fax:

Requisitioned by: Approved by:
Teacher or Dept. Chairman Principal

3. Once approved, please send to Deb Anderson and a Purchase Order WILL BE CREATED. We can do the following:
   a. Fax/ email the PO and RO to the vendor to complete the order.

4. This helps us determine where the package is to be delivered to and helps maintain the proper chain of approval required by our auditors.

Option 2: Credit Card Purchasing: District owed Purchasing Card (BMO, P-Card)

1. If you are an employee, in which the P-card is assigned. I need a copy of the receipt and an approved REQUISTION for every purchase on the card weekly.
2. If a product or service is purchased online then I need the confirmation of the purchase and attached to a approve REQUISTION sent to me via email to District mail.

Option 3: Wal-mart Cards:

1. Every school has a Wal-mart card that is used for supplies etc. These cards are now being housed here at the District Office. If you need the card to make some purchases please bring a signed (by administrator) Requisition Order to me, and I will check the card out to you. You must then return the card in the same day to the District Office with the receipt of the purchase.

Option 4: Reimbursable Purchases:

1. These are supplies bought with an employee's personal funds.
2. Items should be approved prior to purchase by the administrator of that school. A school voucher needs to be completed and signed w/ the receipt attached.
3. Please see an example of a Voucher found on website and in school Office.

VOUCHER

POLSON PUBLIC SCHOOLS
SCHOOL DISTRICT #23 LAKE COUNTY
11 4TH AVE EAST - POLSON, MONTANA 59860

DATE

PAYEE

MAIL ADDRESS

PO BOX OR STREET NUMBER

CITY STATE ZIP CODE

Purchase Order #	Firm's Invoice #	Quantity	Articles or Services	Unit Price $$	Amount $
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
					$ -
				Total Due:	$ -

The undersigned declares that the items mentioned in the foregoing account were furnished as therein stated, and that the amount therein claimed is correct, just, due, and wholly unpaid.

Payee BY

4. These items should only be local merchants and no online orders. All receipts need another signature illustrating they were received at the school

Travel Form for all Travel Approval

5. Mileage and Per Diem needs to be entered into either the In State Travel Form or Out of State Travel Form (in excel) prior to the actual conference or reason for travel printed and approved by SUPERVISOR & SUPERINTENDENT. **Credits of completion must be attached to Travel Form, in order to be reimbursed. Please see an example of Travel form below.**

Polson School District #2 Professional leave / Travel Authorization For Date:

Event Name, Location and Date:

Reason for Travel:

Drivers Name:	LODGING		MEALS				Miscellaneous		
TRAVELER'S NAME (List All)	# of Nights	Lodging Cost Request Pcard	# of Breakfasts $6.00	# of Lunches $7.50	# of Dinners $14.50	Total Meal Reimb	Registration Fees: District Paid ____YES, ____PO#	Registration Fees: Employee Paid ____ Yes	Sub Costs ($80.00/ ____ Yes
						$0.00			
						$0.00			
						$0.00			
						$0.00			
						$0.00			
						$0.00			
						$0.00			
						$0.00			
						$0.00			
						$0.00			
Meals	0	$0.00	0	0	0	$0.00	0.00	$0.00	$0.00

MILEAGE:

1. Points of Travel (list round trip, e.g., Mi	Polson-MSLA-Polson		Personal Vehicle
2. Number of vehicles	1		
3. Number of Miles Traveled,	0		District Vehicle
4. State mileage rate (per mile)	$0.580		
5. Total Reimb. for Mileage at State Rate (I	$0.00		

OTHER COSTS

	Amount
	$0.00
	$0.00
TOTAL OTHER	$0.00

TOTAL Cost

Lodging	$0.00	Expenditure Budget Code	
Meals	$0.00		
Mileage	$0.00	*Charge To:*	
Other	$0.00		
Sub Costs	$0.00	Fund Description:	
TOTAL	$0.00		

Principal / Director Date Superintendent Date

If any of this is confusing please feel free to give me call.

Deb Anderson
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Polson School District #23
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406-872-0103
406-883-6345 Fax