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# **SPECIAL EDUCATION PURCHASE ORDER REQUISITION (SED-P020)**

WENATCHEE SCHOOL DISTRICT

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## **1.0 SCOPE:**

- 1.1 This outlines the procedure for submitting a request for purchasing materials and supplies for the classroom using funds from the Special Education Department budget.

**The online version of this procedure is official; therefore, all printed versions are unofficial copies.**

## **2.0 RESPONSIBILITY:**

- 2.1 Director of Special Education, Assistant Director of Special Education, Special Education Secretary, Director's Secretary

## **3.0 APPROVAL AUTHORITY:**

- 3.1 Director of Special Education or Assistant Director of Special Education

## **4.0 DEFINITIONS:**

- 4.1 Skyward – School Management System
- 4.2 Procurement Card – Department Visa Credit Card
- 4.3 PDF – Portable Document Format

## **5.0 PROCEDURE:**

- 5.1 Special Education staff member completes Requisition Form PUR-F001 for materials and supplies and sends form to the Director or attaches cart by email if online order.
  - 5.1.1 Information provided includes the individual cost of the item, description of the item, vendor name, address, and fax number.
  - 5.1.2 If purchasing locally, include the description of each item, the cost of each item, and the total cost including the local tax rate.
  - 5.1.3 If technology-related purchase, the Director of Operational Technology should be contacted for best pricing and source.
- 5.2 Requisitions are reviewed by the Special Education Department administration.
  - 5.2.1 Incomplete forms are returned to the appropriate staff member for completion.
  - 5.2.2 The requisition must meet the needs of the students and staff and be within budget.
  - 5.2.3 If administration needs more information about the purchase, the appropriate staff member is contacted and the request is accepted or denied, based on the additional information provided.
- 5.3 After the requisition has been approved, the Special Education Secretary processed the purchase order by entering it into the Skyward Financial Management System.
  - 5.3.1 Procurement Card orders:

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- 5.3.1.1 For online or phone orders, the department procurement card can be checked out through the Director's Secretary.
- 5.3.1.2 The order can be placed online or by phone with the information provided by administration approval and shipped to the warehouse address.
- 5.3.1.3 A copy of the order or invoice will be printed to pdf and a copy given or forwarded electronically to warehouse manager with the "Mark For" destination of the order recipient.
- 5.3.1.4 The procurement card is returned to the Director's Secretary by the end of that business day with a copy of the order or Invoice.
- 5.3.2 Orders are received at the district warehouse, inspected, and then sent to the appropriate Special Education staff member listed in the "Mark For" section.
- 5.3.3 Local Purchase Orders: The Special Education Secretary will process the Purchase Order Requisition and contact the appropriate Special Education staff member when the purchase order is ready for pick up.
- 5.3.4 Receipts from local purchases will be turned into the Special Education Secretary within the day of purchase. The receipts will then be forwarded to the Accounts Payable Department for payment.
- 5.3.5 Office Depot Purchasing Card
  - 5.3.5.1 The Office Depot Purchasing Card is available for checkout to purchase supplies at local Office Depot store through the Director's Secretary.
  - 5.3.5.2 Staff member returns Office Depot Purchasing Card to the Director's Secretary the same day with the invoice or receipt of items purchased.
  - 5.3.5.3 If an item will be shipped to the warehouse, a copy of the invoice or receipt must be sent to the warehouse manager.

## **6.0 ASSOCIATED DOCUMENTS:**

- 6.1 Purchase Order Requisition PUR-F001

## **7.0 RECORD RETENTION TABLE:**

| <u>Identification</u>        | <u>Storage</u>  | <u>Retention</u> | <u>Disposition</u>     | <u>Protection</u> |
|------------------------------|---|------------------|------------------------|-------------------|
| Requisition Form<br>PUR-F001 | Secretary to<br>Special<br>Education<br>Director's File | Five years       | Discard, as<br>desired |                   |

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**8.0 REVISION HISTORY:**

| <u>Date:</u> | <u>Rev:</u> | <u>Description of Revision:</u>   |
|--------------|-------------|---|
| 11-May-01    | A           | Original Release  |
| 25-Jan-02    | B           | Changed form number in 5.1, clarified job title in 5.2, 5.4.1, 5.4.2, 5.4.5, 5.4.6, and changed "item" to "purchase order" in 5.4.5 |
| 16-Jan-03    | C           | Updated Approval Authority to include Assistant Director of Special Education; updated form number in 5.1                           |
| 16-Nov-03    | D           | Deleted 5.3.3   |
| 2-Oct-08     | E           | Changes 5.1 Purchase Order Requisition; changed Director's Secretary to Special Education Secretary.                                |
| 25-June-10   | F           | Complete revision of SED-P020   |