**A Guide to Purchasing Services**

**Purchase Requisitions and Purchase Order – Step by Step**

Please plan ahead and do NOT purchase anything until a Purchase Order has been issued. There are two separate documents that are often confused:

* Purchase Requisition (REQ) – First step to generate a Purchase Order, this form provides budget manager approval.
* Purchase Order – Guarantees that purchase is approved and the purchase will be honored by the district.

**What services does the Purchasing Agent provide?**

* Purchases goods and services.
* Provides information about products, prices and specifications.
* Maintains a Mini-Mall of commonly used, expendable office supplies.
* Maintains an inventory of assets over $750.00.
* Controls the disposal of surplus property in conjunction with maintenance.
* Purchasing assistance to employees.

**Who has legal authority to purchase?**

* Board policy prohibits individuals from incurring any expense without a purchase order signed by the Superintendent/ President or the Chief Financial Officer/Business Services.
* Individuals who purchase goods or services prior to the issuance of a purchase order may be held personally liable for those expenditures.

**How do I request goods or services?**

* Submit a *purchase requisition* through Self-Service Banner. (Please note that a requisition is not a purchase order.)
* Provide complete description of the item(s) or service(s) to be purchased. Include catalog numbers if applicable.
* Include shipping and handling charges. Estimate if exact cost is unknown.
* *Solicit quotes/bids in accordance with the following Board policy:*
* Less than $4,000.00—One (1) verbal quote.
* $4,000.00 to $9,999—Three (3) verbal quotes.
* $10,000.00 or more—Three (3) **written** quotes. Provide Quotes to Purchasing (before REQ is created).
* Work consisting of $15,000 (refer to Public Contract code or more or tangible goods costing more than $88,300-Formal Advertising and receipt of sealed bids.
* Sole Source or Proprietary Purchases—Quotes are not required. In some cases, there is only one source for your purchase requirement. Sole source purchases MUST include a COMPLETE justification for the sole source. Submission of justification, even though approved by purchasing, does not negate the requirement to obtain pricing confirmation from the specified vendor. For examples of sole source justifications, please contact the purchasing office.
* Independent Contractors—To purchase the services of an independent contractor, contact the Human Resources Office. They will provide you with the necessary forms and instructions.

*Note: A service contract must be completed and a purchase order issued before an independent contractor provides services or goods. Independent contractors will receive payment for their services by submitting an invoice to the College. Invoices will not be accepted for work not yet performed.*

**How long does it take to get a purchase order?**

* The average PO processing time is **5-7 business days of receipt of an approved requisition**. The process time can increase during our peak season (April-May and July-August)

**How will I know my request has been processed?**

* You can view the Approval process through Self-Serve Banner by accessing your Requisition.
* There must be a ‘print date’ listed on the PO. That is the final approval.
* Contact Purchasing Agent for status of pending orders.

**How can I speed up the purchasing process?**

* Provide a fax number or email address in the Printable Document Text.
* Obtain your own quotes and provide quote # in the Printable Document Text.

**How are goods and services paid for?**

* Once goods or services are received, payment is normally made within two (2) weeks of receipt of an invoice.
* Original invoices must be signed “OK to Pay” by the budget authority with the Purchase Order number.
* Accounts Payable checks are issued weekly on Monday or Tuesday and are normally mailed on Thursday.

# New Vendor Setup Request

1. **Request a current W-9 from the vendor** (not required for magazine/newspaper subscriptions).
2. If a Business Name and "Doing Business As" (DBA) name are listed, please indicate which name will be used for invoicing.
3. If the mailing address is different than what is provided on the W-9 form, please include the correct mailing address in the email request.
4. **Submit the phone, fax, address information, and the completed W-9 form via email to Tamara Cline at** [tcline@frc.edu.](mailto:tcline@frc.edu.) The phone, fax, address and the contacts email address should be provided in the body of the email.

**Mini-Mall**

* Located inside the Purchasing Office.
* Contains commonly used, expendable office supplies.

**Petty Cash**

* Obtain approval from Budget Authority to expend funds.
* Submit ***original*** receipt on “Petty Cash Form” to Budget Authority for signature and budget code to be reimbursed from.
* Take or forward to the Purchasing Agent to receive reimbursement. Receipt must indicate budget to be charged and be signed by Budget Authority and/or Supervisor.
* Petty cash is limited to expenditures of $100.00 or less. Petty cash reimbursements are issued on average within 5-7 working days.

**Purchasing Forms can be found on the FRC website:**

**http://www.frc.edu/businessservices/purchasing.cfm**