

## Purchasing

1. Carefully plan your Supply, Equipment and Travel requests. Your Needs Assessment and Travel Request document should list, in priority order, additional and/or replacement equipment, travel requests, registrations, estimated sub coverage, repairs, maintenance needs, and competitive CTSO travel expenses estimates, etc. Approval of each Need Assessment and Travel Request item will be based on several factors, so please do not assume your request will be approved. The Director will send responses to requests.

***Note: Equipment must be used in the year it was purchased. The equipment cannot sit in storage in your classroom or elsewhere.***

2. [Purchase request forms \(Requisitions\)](#) are submitted when ordering supplies or equipment for the CTAE program you teach. **[A purchase requisition form is required to have a PO created.](#)** All submissions will be reviewed, approved or rejected if not a permissible or required item. **Requested items must be listed on the Needs Assessment Form for approval; requested items that do not appear on the Needs Assessment Form will be denied.**

3. **[Submitting a Purchase Requisition:](#)** contact the vendor you are ordering supplies/equipment from and obtain a written quote to include: shipping costs (this costs must be included in the quote and on PO). If the item is more than \$3,500, obtain a 2<sup>nd</sup> quote from a “different” vendor for the same exact item(s). **Do not send** the first quote with itemized pricing to the vendor, you must only send the list of item(s) to obtain a second quote.

4. The vendor packet in the appendix section of this manual has to be used to add a new vendor

5. Complete the [Purchase requisition](#) in its entirety (do not leave any cells blank, this will delay processing).

6. Obtain original signatures: Teacher, Principal, e-mail to CTAE Administrative Assistant, Sharon Bates who will obtain CTAE Director signature and others, if required.

7. Keep a copy of your purchase requisition for your records to accurately record your inventory and to identify **Funding Sources** (5700 – General Funds and 5796 – Perkins Fund) located in the upper right corner of Receiving Copy.

8. ALL [Requisitions](#) must be TYPED. Any handwritten purchase requisitions will not be accepted. Requisitions must also be printed full page and have signature of teacher and principal before it will be reviewed.

9. Purchase requisitions will be reviewed, approved, and/or denied by Tomas Ramirez - CTAE Director.

10. The item(s) are shipped to the CCSD warehouse.

11. Any item(s) with a unit cost of \$300 or more requires a red CTAE Barcode- request the necessary amount of red CTAE Barcodes for all electronics, equipment and supplies over \$300 from Asset Coordinator, Thomas Rhoads. Deliveries should arrive within 7-10 business days. If not received, contact the vendor for delivery status.

## Additional Information Regarding Staples, Office Depot, Kroger, Lowes:

- KROGER (East Side Store Only- Vendor# 332856)...Phone (706)353-8543, Fax (706)357-7175
  - ❖ School District Contact: Store Manager.
  - ❖ Product Catalogs: Not Available
  - ❖ Pricing & Availability: Market price and in-stock availability.
  - ❖ Purchasing Requirements: Clarke Schools Account Number 585884110109-8027 MUST be used and this account number is on file at the Service Desk. Service desk personnel are to be advised of planned charges before shopping. Approved purchase orders with estimated purchase amount are to be provided to the cashier with instructions to charge to Clarke Schools *AS A TAX EXEMPT SALE*. The vendor will provide a copy of the cash register receipt and the purchase order number should be listed on this receipt. ***CHECK THE RECEIPT BEFORE LEAVING THE REGISTER AND HAVE IT CORRECTED IF SALES TAX HAS BEEN ADDED.*** Submit the ***CASH REGISTER RECEIPT*** to Sharon Bates. The purchase order number should be listed on these documents.
  - ❖ Delivery: Not Available.
  - ❖ Order Pickup: Can pick order with approved purchase order and Clarke County Schools ID.
  - ❖ **Receipt: Original receipt must be mailed to Sharon Bates within 3 days of purchase**
- KROGER (West Side Store only -Vendor# 332857)...Phone (706)543-0209, Fax (706)543-0465
  - ❖ School District Contact: Store Manager.
  - ❖ Product Catalogs: Not Available
  - ❖ Pricing & Availability: Market price and in-stock availability.
  - ❖ Purchasing Requirements: Clarke Schools Account Number 585884110109-8019 MUST be used and this account number is on file at the Service Desk. Service Desk personnel are to be advised of planned charge before shopping. Approved purchase orders with estimated purchase amount are to be provided to the Service Desk so that they can enter the charge on the receipt at the cashier station. The vendor will provide a charge slip and a copy of the cash register receipt. ***CHECK THE RECEIPT BEFORE LEAVING THE REGISTER AND HAVE IT CORRECTED IF SALES TAX HAS BEEN ADDED.*** Submit the ***CASH REGISTER RECEIPT*** to Sharon Bates. The purchase order number should be listed on these documents.
  - ❖ Delivery: Not Available.
  - ❖ Order Pickup: Can pick order with approved purchase order and Clarke County Schools Id.
  - ❖ **Receipt: Original receipt must be mailed to Sharon Bates within 3 days of purchase**
- LOWES 3341 Lexington Road, Athens, GA Vendor# 634720)...Phone (706) 208-3501 **DO NOT SUBMIT ORDERS ONLINE**
  - ❖ School District Contact: Customer Service/Pro Services-Kathleen [Weed:kathleen.weed@store.lowes.com](mailto:Weed:kathleen.weed@store.lowes.com)
  - ❖ Product Catalogs: Not Available
  - ❖ Pricing & Availability: Market price and in-stock availability.

❖ Purchasing Requirements: Approved purchase order and CCSD ID must be presented to Customer Service prior to shopping. After shopping, the purchase is taken back to Customer Service for processing with instructions to charge Clarke County Schools as a tax exempt sale. Check the receipt before leaving and have it corrected if sales tax has been added. Submit the CASH REGISTER RECEIPT to Sharon Bates. The purchase order number should be listed on these documents.

❖ Order Pickup: Can pick up an order with approved purchase order and Clarke County Schools ID.

❖ Receipt: *Original receipt must be mailed to Sharon Bates within 3 days of purchase*

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LOWES 1851 Epps Bridge Road, Athens, GA Vendor# 340900)...Phone (706) 613-1100 **DO NOT SUBMIT ORDERS ONLINE**

❖ School District Contact: Customer Service/Pro Services-David

[Johnson:david.a.johnson@lowes.com](mailto:david.a.johnson@lowes.com)

❖ Product Catalogs: Not Available

❖ Pricing & Availability: Market price and in-stock availability.

❖ Purchasing Requirements: Approved purchase order and CCSD ID must be presented to Customer Service prior to shopping. After shopping, the purchase is taken back to Customer Service for processing with instructions to charge Clarke County Schools as a tax exempt sale. Check the receipt before leaving and have it corrected if sales tax has been added. Submit the **CASH REGISTER RECEIPT** to Sharon Bates. The purchase order number should be listed on these documents.

❖ Order Pickup: Can pick up an order with approved purchase order and Clarke County Schools ID.

❖ Receipt: *Original receipt must be mailed to Sharon Bates within 3 days of purchase*

### **STAPLES and OFFICE DEPOT - DO NOT SUBMIT ORDERS ONLINE**

Staples and Office Depot have district contracts with CCSD and therefore pricing is discounted on various items. No “shipping” cost is charged for deliveries and no W9 is needed. In order to obtain the discounted price, you must login with the following information for accurate pricing.

**Staples:** [www.staplesadvantage.com](http://www.staplesadvantage.com)

**Office Depot:** <https://business.officedepot.com/> (SALES REPRESENTATIVE Beau Nutt <mailto:Beau.Nutt@odpbusiness.com> )

- Enter items in the search bar, save to shopping cart and print.
- Attach shopping cart to PO Requisition and forward to Sharon Bates

**\*\*REMINDER: DO NOT SUBMIT ORDERS ONLINE OR OVER THE PHONE\*\***

## Requisitions

**The Purchase Deadline is January 15th of each year. Unused funds will be redirected for other CTAE priorities after the January 15th deadline.**

1. [CTAE Purchase Requisitions](#) are due **no later than January 15th of each year** to Sharon Bates. No exceptions will be made to the purchasing deadline.
2. As the content expert, you are entrusted to know the best vendors to use to procure the materials you need for your classes; however, if a price seems exorbitant on a quote, please know you may be asked to provide cost comparisons and/or to reconsider before approval can be granted.
3. Purchase order requests must be submitted in a timely manner so materials are procured and received in time to ensure appropriateness for learning.
4. Reminder: work thoroughly with the CTAE Administrative Assistant (Sharon Bates) to close out purchase requisitions. When an order is received, the teacher should account for the item(s) on the Receiving Copy, sign the form and maintain a copy to record inventory based on funding source. The CTAE Administrative Assistant will send the original form to Accounts Payable via interoffice mail.
5. When an order is received teachers **MUST** also record the item on the CTAE Inventory form. Failure to record inventory may result in future procurement requests being denied until the inventory record is updated accurately.
6. In the event a Purchase Order (PO) has been approved and you have not received your order, work closely with the CTAE Administrative Assistant (Sharon Bates) to check on the status of the order.
7. For your protection, any funds handled as part of Career Technical Student Organization (CTSO) accounts must be treated with extreme care. Please adhere to your school policies regarding handling of school funds, fundraising and/or CTSO funds.
  - a. Some “DO NOT” tips...
    - a. Take in money without providing receipts.
    - b. Deposit money without receiving a receipt from your Bookkeeper.
    - c. Have money that you take in within your possession beyond that day – make daily deposits, if necessary.
    - d. Leave monies unsecured (i.e. on your desk, within view, within an unlocked location).
    - e. Use club funds for any purpose other than CTSO students. Teacher expenses should flow through the CTAE department.
    - f. Have money sent to your home for any reason – have students and parents send funds to the school, if they are unable to give to you personally.