PURCHASING

Kristi Russell
WELCOME BACK RESOURCES

- Save the link to the SharePoint Purchasing Hub (replacing the OneNote) for information regarding all things Purchasing including training materials and reference guides:
  
  SharePoint Purchasing Hub

- Screen sharing available through Teams and is a great resource to assist you with Skyward purchasing tasks. We are happy to help you understand the processes if you are stuck - contact Toni (X96091) or Lexy (X96090) for assistance.

- New to Skyward? A “How To” slide deck with screen shots is available for review on the SharePoint Purchasing Hub in the "Information" tab in the Secretaries section.
The Basics

- Do not place an order with a vendor without having an approved purchase order (PO). Orders placed without an approved PO will be the financial responsibility of the requesting staff member. MISD is only obligated to pay if a PO is in place prior to the order.

- Purchase from vendors with valid contracts in Skyward – see the Approved Vendor List on the Purchasing department page on the MISD website. Contact Purchasing for sourcing assistance if the item needed is not available from an approved vendor.

- Credit cards are the last option for form of payment – most approved vendors accept PO's or a check from the district. Contact Purchasing if a vendor states they will not take a PO or a district check.
Every event-related requisition (registration, rentals, food/light refreshments) MUST HAVE a narrative line with the following:

Who: STUCO
What: Fall Dance
Where: Campus
When: October 17, 2022

If provided a quote, it MUST BE attached in Skyward and the quote number referenced in the narrative. Your requisition line items need to match the quote line items EXACTLY. Blanket PO’s are only allowed for library book purchases and retail shopping unless pre-approved by Purchasing.

Requisitions utilizing contract numbers from BuyBoard, OMNIA, TIPS, DIR, ESC6, and Choice Partners MUST HAVE the contract number referenced on the quote.
New print services bid has been awarded – 22-026. The bid tabulation is on the SharePoint Hub under "Current Pricing".

Business card vendor depends on the amount ordered – the 250/Box orders go to Dallas ISD Graphics Department and 500/Box orders go to B&B Commercial Printing.

If the item you need printed is not specifically listed on the bid tab, contact any vendor listed in the blue "Percentage Discount" section at the bottom of the bid tab for a quote.
Software renewals on the Citibank card MUST have a PO in place PRIOR to the renewal charge hitting the card.

Any charge that hits the card prior to the PO will require a PDSA form and a check request for processing to satisfy audit requirements.

Please review any purchases you have made using Object Code 6397 to determine which ones are paid for with the Citibank card, and then clone those PO's NOW to avoid this issue. Examples include Smore, Nearpod, Flocabulary, GoDaddy, Vimeo, etc.
ACCOUNT CODE NOTES

- Parking lot supplies (cones, signage, safety vests, etc.) – Function 52, Object 6399

- Staff trainings at Region ESC's – Object Code 6239

- Staff trainings, conferences, webinars, online courses (except Region ESC's) – Object Code 6411

- Watch your PIC codes – 21 GT, 23 SPED, 25 ESL, etc.
FRIENDLY REMINDERS

- Citibank PO's for purchases from approved vendors – create a YMA requisition, choose the Vendor's name in Skyward (no longer Citibank) and select the contract.

- Citibank PO's for purchases from unapproved vendors – create a YDA requisition, choose "Citibank" for the Vendor's name in Skyward, and enter the commodity code approved by Purchasing. You will still need to list the actual vendor's name in both the master description and the line item description.
Contract Approval Forms no longer need a copy of the requisition attached. Just include the full budget code on the form so Purchasing can verify that funds are available to encumber for the total amount of the contract.

All requisitions for contracted goods and/or services MUST have a signed/approved Contract Approval Form attached or it will be denied.
$1.00 PO's for T-Shirts, Fundraisers, and Field Trips are not allowed. The requisition will need to reflect the line-item descriptions and pricing from the quote, and the quote **MUST BE ATTACHED** to the requisition in Skyward to gain approval.

E-Commerce PO’s cannot be edited once approved.

Hobby Lobby, Mardel and Tractor Supply shopping requires the district credit card. Hobby Lobby and Mardel also require their store specific tax exempt card. Contact Purchasing if you need copies of these cards for your campus or department.

All requisitions for general supplies must designate "classroom supplies" or "office supplies" with the correct corresponding function or they will be denied.
• Make sure the vendor you want to use is approved – download and check the Approved Vendors List on Purchasing’s webpage.

• Just because a vendor is in Skyward does NOT mean they are approved.

• If a vendor is in Skyward AND a **CURRENT** contract is assigned to that vendor, then the VENDOR is approved.

• If the vendor does not have a contract listed, contact Purchasing **BEFORE** requisition entry for assistance.
YMA requisitions (the default format) should have a contract number. YDA requisitions need a commodity code for each item. These will not be selected until you get to the line item entry.

**DO NOT USE A COMMODITY CODE AND A CONTRACT NUMBER!**
Always use the contract code first. Only use a commodity code if a contract number does not exist.

If you notice anything weird about the contract (expiration date has already passed) please let Purchasing know so we can make the necessary correction(s).

When cloning requisitions, **always update the contract field** as the old contract may have expired.
All vendors that access your campus MUST have a current Vendor Badge. Please screen your vendors and contact Purchasing if you have an issue.

All bounce house rentals must be cleared through Risk Management before submitting a PO to the vendor. Workers that set-up/tear down before and after school do not need a Vendor Badge. All vendor staff that stay and work the event must be badged.

All DJ's must have a current Vendor Badge and clearance from Risk Management if working an event on district property.
Blanket PO’s should be used only with vendors such as Sam’s, Kroger’s, Walmart, Mardel, Hobby Lobby, Home Depot, Lowe’s etc. Make sure to send the shopper with a district Tax Exempt form.

District credit cards and receipts must be returned within 24 hours of check-out.

Blanket PO’s are for one-time use ONLY.

Remind staff members that shop to NOT EXCEED the amount of their PO and to check the receipt for tax while at the store.

When shopping on Amazon, select PRIME vendors only – PO's with shipping charges will be denied.

And speaking of Amazon...
AMAZON PURCHASING

- Should not be your "first choice" vendor;

- Quote form is a required attachment on Amazon requisitions when ordering office supplies, instructional supplies, and technology coded items (6396/6397). Examples are in the Hub.

- Quotes must be from current approved vendors for these types of items – see the Approved Vendor List.

- If item(s) are not available from other approved vendors, contact Purchasing for next steps.
AMAZON PURCHASING

- **Example:** Ordering Sharpies, post-it notes or any office supplies or art supplies
  - The quote must include current vendors - Staples or Business Essentials, School Specialty and Amazon with pricing.

- **Example:** Technology supply items must have quotes from current vendors
  - The quote must include current vendors, CDWG or Connections E-Commerce’s store front and Amazon pricing.
  (NO Computers, laptops, iPads)
Amazon Cut-Off Dates for FY 22-23:

- Thanksgiving Holiday Cut-off – Friday, 11/11
- Winter Holiday Cut-off – Friday, 12/2 (just 1 week after we return from Thanksgiving break)
- Spring Break Cut-off – Friday, 3/3
- End of Year Cut-off – ES/IS - 3/31/23
  MS/HS/Depts - 4/21/23

PLEASE PUT THESE DATES IN YOUR CALENDAR!!
Education Foundation grant funds must be used with approved vendors.

Partner with your grant writing teachers to help them find approved vendors and submit the correct budget coding with their application. Grant applications without an approved vendor(s) or correct budget coding will not be approved.

If you need sourcing assistance, please let us help!

Technology items will still need to be approved by Technology prior to purchase.

Any grants that involve floor or wall stickers, paint, or permanent installation of an item(s) to the building or grounds require Maintenance approval prior to purchase.
Records Management has a new process. The Records Management Guidebook can be located on the Distribution webpage. Contact Melida Carpenter with questions.

School Dude - Reminder that “Pick up”, “Delivery” & “Records Management” icons are only for Warehouse work orders.

PPE questions and orders – email Ed Harper.

Questions about distribution related items: email Brad Barker or Melida Carpenter.
Updated guidance is available in the SharePoint's Travel section.

Guidance is specific to role – Traveler responsibilities and Secretary/Bookkeeper responsibilities.

AP will no longer issue ANY checks for hotel charges or student meal money.

For student group travel reservations, contact Ann at Arta Travel. A $10.00 service fee will be assessed for this service.
TRAVEL UPDATES

1. BEFORE THE TRIP

TRAVELER: contacts the hotel directly to make reservations... NO HHotels, motels, inns, etc. validated. If a hotel is overbooked, the hotel may cancel the reservation.

If a hotel is overbooked, the traveler must call the hotel directly to cancel the reservation. The hotel may cancel the reservation if the traveler does not confirm the reservation within 24 hours of the reservation date.

2. DURING THE TRIP

Travelers are responsible for checking in at the hotel desk and presenting the hotel key. The hotel key is valid for the length of the stay.

3. AFTER THE TRIP

The travel card must be returned to the traveler within 7 days of the return date. If the travel card is not returned, the traveler is responsible for any additional charges.
TRAVEL UPDATES

1. BEFORE THE TRIP

☐ HOTEL SPONSOR can make reservations with either personal credit card or contact AFA Travel (817-977-7107) to make group reservations ($10 fee per room)

☐ After reservations are confirmed, send the hotel’s front desk DIRECTLY and use a fax, not a fax-back service – NOTATE BELOW

☐ City/County occupancy tax % _____________ Team/FD tax % _____________ Other fees/charges _____________ Parking charges _____________

Dove hotel requires a credit card authorization form when using a District travel card ______ Y ______ N

☐ SPONSOR completes Meal Money Worksheet from MISD Travel Manual for all students, staff traveling.

☐ Rental car required ______ Y ______ N If required, see Travel section of MarshPoint for instructions

☐ Airfare required ______ Y ______ N If required, see Travel section of Purchasing MarshPoint for instructions

☐ Rossana for Travel__________

☐ Dates of travel___________

☐ Budget code for travel___________

WHEN COMPLETE, SDL TRAVEL CHECKLIST 2: HOTEL, RENTAL CAR/AIRFARE CONFIRMATION, 3: CREDIT CARD AUTHORIZATION FORM IF REQUIRED, AND ANY REQUIRED APPROVAL EMAILS TO YOUR SECRETARY/BOOKKEEPER AND REQUEST PURCHASE ORDER CHECKS TO AT LEAST 15 DAYS PRIOR TO TRAVEL.

ONCE COMPLETED, EMAIL APPROVED TRAVEL PICS TO NRS@NRS.MISD.EDU TO REQUEST TRAVEL CARD CHECKOUT AT LEAST 20 DAYS PRIOR TO TRAVEL. EMAIL SUBMENTS ARE VALUABLE TRAVEL CARD REIMBURSEMENTS TO DELAY.

☐ Confirm that you have received an email from the Travel Contact stating that the travel credit card packet is ready to be picked up. If no confirmation form is used and the hotel does not require the card presented at check-in, you will receive an email stating this change.

2. DURING THE TRIP

☐ Spouses are responsible for checking in at the front desk and presenting the Hotel Occupancy Tax Exemption form from Texas. Out of state trips are not tax exempt and the District pays all hotel taxes/fees.

☐ Spouses are responsible for checking out at the front desk and mailing the bill to the budget office (i.e. no state taxes within Texas, no personal charges, etc.) check out at the front desk and make sure the bill is correct (i.e. no state tax within Texas, no personal charges, etc.) do not leave the hotel without the bill to the budget office (i.e. no state tax within Texas, no personal charges, etc.) do not alter the door

☐ Spouses are responsible for returning ALL student/staff travel reeiver TRAVELER receipt. Spouses should provide a State Sales Tax Exemption form if the spouse will be traveling with the team. Receipts that are not returned will be handled for by the Traveling

☐ Spouses are responsible for following ALL travel guidelines included in the district travel card packet issued at checkout. Spouses not following this guidance will be financially liable for any unnecessary purchases with the card.

3. AFTER THE TRIP

☐ The travel card packet, hotel and/or reeiver receipts MUST be returned to Purchasing within 3 business days after travel has concluded.

☐ Non-remitted reeiver receipt will not be accepted. Spouse must contact the restaurant to obtain an itemized receipt or the changes will be the financial responsibility of the spouse.

☐ If local charges are not matched the P&9 if there are unapproved charges on the bill, the receipt will not be accepted by Purchasing. Spouse must contact the hotel directly to correct the charges and/or have the unapproved charges removed. Billing errors and unapproved charges not removed from the hotel bill are the financial responsibility of the spouse and the district must be reimbursed.

PT/04/22
TRAVEL REMINDERS

- Cards and receipts must be returned to the Purchasing office the day after travel concludes. We will receive in Skyward and forward receipts to AP;

- Travel credit cards are NOT to be used to pay for meals (unless traveling with students), fuel (unless traveling with students) incidentals, or transportation expenses. These items are reimbursed through Skyward Employee Access using the Expense Reimbursement module.

- Staff traveling on 199, 461, or 865 funds can use the card - contact Purchasing for procedures if traveling on Federal funds.
PURCHASING REFRESH

Kristi Russell
Quotes are required on ALL Federal Funds purchases.

For all others, if there is a competitive bid in place, the quotes are included in that bid, and no quote form will need to be attached.

If there is no competitive bid in place, quotes ARE required. If quotes are not attached, the requisition will be denied.

Quotes may be obtained from phone calls to approved vendors, vendor catalogs, vendor websites or an online search.  This documentation must be kept, AND then...
IS A QUOTE REQUIRED?

- Complete the Quote Form (see SharePoint for a fillable form) and attach it to the requisition.

**QUOTE FORM**

All information requested must be completed. If vendor is not in Skyward, you must complete the necessary vendor paperwork. Attach additional sheets if necessary.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Vendor #1</th>
<th>Vendor #2</th>
<th>Vendor #3</th>
</tr>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>

- Include vendor name, contact and phone number.

**QUOTE GUIDELINES**

ALL purchases will be made through approved vendors when available, regardless of price.

If an item is not on a current bid and the price is more than $100.00, three quotes must be obtained. (Phone, Online Website, Vendor Catalog, etc.) Attach screen shots for online quotes or copies of catalog pages for backup.

If the item cannot only be purchased from a non-approved vendor, you must document that at least two approved vendors were contacted. List all vendors contacted on the form, indicating that they did not have the product requested.

Indicate the requested vendor in the space provided. If vendor selected does not offer the lowest cost, a full explanation shall be provided. (For instance, a vendor may be chosen regardless of higher cost if time requirements are better or if additional products and/or services are offered.)

If an item is available from more than one approved vendor, it is recommended that you get three quotes to obtain the best price.

**TOTAL COST**

List the vendor you prefer to use; give an explanation if not using the lowest price quoted.

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**CAMPUS/DEPARTMENT**

- Federal Funds
- General Funds

**PRINT NAME_**  **EMAIL_**

**PHONE_**  **FAX_**  **DATE_**
When doing business with any individual that provides a service for a fee:

- Less than $1,000 – Informal quote required
- $1,000 - $4,999 – Formal quote required
- $5,000 and up - Contracted Services Agreement must be completed (if contract not supplied by the vendor) along with a Contract Approval Form for the appropriate dollar amount (< $50K and >$50K). These forms are available on the Business Services webpage.

The contractor will need to supply a current W9. If the vendor is not in Skyward, contact Purchasing to discuss.

A purchase order must be created **BEFORE** the service occurs, and vendors must provide their own invoice **AFTER** the service occurs.
CONTRACTED SERVICES AGREEMENT

The Mansfield Independent School District, hereinafter referred to as “District,” and independent contractor, hereinafter referred to as “Consultant,” enter into a contract for the provision of services.

1. District agrees to engage Consultant, and Consultant agrees to perform personally, in a manner satisfactory to District, the services as described in Addendum A. All dates, time, and locations shall be stated therein.

2. District agrees to pay Consultant a fee as per Addendum B compensation for services rendered. Unless specifically agreed to in writing, expenses for transportation, lodging, meals, and materials are incurred by the consultant. All reimbursement for expenses, which are agreed to in writing, associated with consultant services shall be made in accordance with the MISD TRAVEL EXPENSE GUIDELINES FOR CONSULTANT SERVICES.

Consultant shall not be paid in advance. All fees shall be paid after the activity is completed and documented, including invoice, is turned in to the Business Office. It is the intent of the school district to pay all invoices as promptly as possible; however, by acceptance of a district purchase order you have agreed to the 45 day payment policy. All invoices are submitted to the Accounts Payable Department.

3. This agreement shall be in effect according to the approved request for proposal unless terminated by either party at any time, with or without cause. In the event of termination by District or Consultant prior to completion of the contract, compensation shall be prorated on the basis of hours actually worked, services actually provided, or materials actually provided, and Consultant shall only be entitled to receive past and equitable compensation for any satisfactory work completed and expenses incurred up to the date of termination.

District may terminate this contract if funds sufficient to pay obligations hereunder are not appropriated by the MISD Board of Trustees. In the event of non-appropriation, Vendor will be provided ten (10) days written notice of intent to terminate.

4. Consultant may not assign this contract to a third party without the written consent of the District. Consultant must complete the Contractor Certification Form required by Texas Education Code Sec. 211.0034(d) and conduct a national criminal history record information review as required by Sec. 32.3314, at the Consultant’s expense, of all employees employed under this contract, except District employees and current Texas State Certified teachers. No employee of Consultant with a disqualifying conviction shall be allowed by Consultant or District to perform services under the terms of this contract.

Consultant is not an employee of District, and is not entitled to fringe benefits, pension, workers compensation, retirement or unemployment compensation. District shall not obtain or maintain any insurance for or on behalf of Consultant. District shall not deduct federal income taxes, FICA (Social Security), or any other taxes required to be deducted by an employer, as this is the responsibility of Consultant.

5. Consultant agrees to hold District harmless from any and all liability incurred by District by reason of Consultant’s negligence or breach of contract, including, without limitation, damages of every kind and nature, out of pocket costs, and legal expenses.

5 a. (FERPA) As a Consultant retained by the District to perform services under this agreement, the Consultant shall be deemed a “school official” as that term defined in the District’s Board Policy. Further, it is understood and agreed that in order to perform services hereunder, it may be necessary for the Consultant to receive and be provided access to the “educational records” (as defined in the Family Education Rights and Privacy Act of students of the District for whom the Consultant provides services hereunder. Consultant agrees to maintain the confidentiality of any and all educational records of students in the District that are disclosed to, or reviewed by, the Consultant in accordance with Federal and State laws, rules and regulations. Consultant hereby certifies that the confidential and educational information of the District and student will be protected. Consultant shall keep all such information confidential and shall not disclose such information to any third party, except such third party as may be required to perform any services hereunder to which the Consultant is qualified to perform. Consultant also understands that any work created by Consultant pursuant to this agreement shall be and remain the sole property of the District and Consultant hereby relinquishes all rights to such work.

5 b. (HIPAA Compliance) The parties agree to comply with the applicable provisions of the Administrative Simplification Section of the Health Insurance Portability and Accountability Act of 1996, as codified at 45 U.S.C. 1524d through d-5 (“HIPAA”), and the requirements of any regulations promulgated including without limitation the federal privacy regulations as contained in 45 CFR Part 164 (the “Federal Privacy Regulations”) and the federal security standards as contained as 45 CFR Part 164 (the “Federal Security Regulations”). The parties agree not to use or further disclose any protected health information, as defined in 45 U.S.C. 1524d, 1540a, or individually identifiable health information, as defined in 45 U.S.C. 1540b (collectively, the “Protected Health Information”), concerning a patient other than as permitted by this Agreement and the requirements of HIPAA or regulations promulgated under HIPAA including without limitation the Federal Privacy Regulations and the Federal Security Regulations. The parties will implement appropriate safeguards to prevent the use or disclosure of a patient’s Protected Health Information other than as provided for by this Agreement. Consultant will promptly report to District any use or disclosure of a patient’s Protected Health Information not provided for by this Agreement or in violation of HIPAA, the Federal Privacy Regulations, or the Federal Security Regulations of which Consultant becomes aware. Consultant will make its internal practices, books, and records relating to the use and disclosure of a patient’s Protected Health Information available to the Secretary of Health and Human Services to the extent required for determining compliance with the Federal Privacy Regulations and the Federal Security Regulations. Nonetheless, the foregoing, any attorney-client, accountant-client, or other legal privilege shall be deemed waived by Consultant by virtue of this subparagraph.

This Agreement, including attachments hereto, all of which are incorporated herein by reference, constitutes the entire understanding and agreement of the parties, whether written or oral, with
respect to the subject matter hereof and supersede all prior and contemporaneous agreements or understandings between the parties. Unless an agreement is made, in writing, that alters this page, any query brought forward questioning the order of precedence relating to any written agreements between the parties, this contract will supercede all others including any attachments.

6. MEDIATION: Either party to this Agreement may demand non-binding mediation of any claim, dispute, or other matter in conflict between the parties and arising under, out of, or related to this Agreement. All such demands shall be in writing. In the case of claims by Consultant against the District, such demand shall be made prior to the commencement of any lawsuit filed by the consultant. The District shall implement the procedures described in the District's board policies (LOCAL) and (Q) with consent of the consultant for mediation.

Following the mediation, the District shall implement the mediation described in the complaint procedures found in the District's board policy (LOCAL) and open to any complaint by the District and written demand for mediation. The District may, at its option, either proceed with non-binding mediation of the dispute, or provide written notice to the consultant of the District's decision to waive its right to compel such mediation.

If the District waives its right to compel mediation, then the consultant is free to pursue its civil remedies, if any. Mediation under this paragraph shall take place before a neutral third party, agreed to by the parties. If the parties cannot agree to the neutral third party, each shall select a mediator, and the two mediators shall select a third party neutral third party under rules mutually agreed to by the parties and the mediator, such party will bear its own expenses of mediation. The cost of the third party neutral shall be borne equally by the parties. Failure of the mediator to resolve issues acceptable to all participants within 15 days of the mediation shall allow either party to pursue its civil remedy. Consultant and District agree that venue, in the event of suit, is in state court of Tarrant County, Texas.

7. Contractor shall perform and maintain all services specified by District prior to beginning performance under this Agreement, during the term of this Agreement, and beyond the term of this Agreement if required by District. Copies of all policies and procedures, as well as proof of insurance or any other certificate of insurance shall be provided to District at least five (5) days prior to the beginning of service under this Agreement.

8. As required by Texas Education Code sec. 44.014, any person or business entity entering into a contract with District must give written notice to District if the person or owner of the entity has been convicted of a felony and such notice shall include a general description of the conduct resulting in the felony conviction. Failure to provide such notice or misrepresentation of the conduct resulting in the conviction constitutes grounds for termination of the Agreement.

9. Consultant and its subcontractors shall not discriminate against any employee or applicant for employment on the basis of race, religion, age, disability, national origin, or any other protected classifications under federal or state law.

10. District is an exempt entity under the laws of the State of Texas and shall not be liable for payment or remuneration of any taxes paid by Consultant which District is exempt from paying under state law.

11. The validity of any part or portion of this Agreement shall not invalidate, impair, or otherwise affect the validity, effect, or enforceability of any other remaining part or portion of the Agreement.

In Witness Whereof, Mansfield Independent School District and Consultant have executed this contract, effective the date as which the last party to sign the agreement executes this agreement.

By: Mansfield ISD
By: CONSULTANT
Signature: ____________________________
Printed Name: ________________________
Title: ________________________________
Date: _______________ Date: ____________

For contracts of $10,000 or under
Terms of Request for Proposal: Beginning Ending
BID # ______________________________

For contracts $49,999 or less
Vendor #: ____________________________
Terms of Request for Proposal: Beginning Ending
MISD Staff Contact Person: __________________
Phone number: _______________________
Compartment: _________________________
Budget Account Code(s): __________________
1. Please note whether it is a new or renewal.
2. Complete amount and budget code.
3. Note if no funds will be spent.

Originator Signature
Principal / Director Signature
Purchasing Director’s Signature
Executive Council Signature (if required – more than $5000.00)
The signature on a contract *CANNOT* be the Sponsor; it must be the employee who has designated signing authority – Principal, Director, etc..

The contract and contract review form need to be submitted to Purchasing for approval at least 30 days before the event or before items are purchased.
A retreat is approved to be off district property with these requirements:

- MISD approved vendor must be used
- During the Day (work hours)
- No alcohol
- Within per diem ($13 breakfast, $15 lunch) + $10 per activity
- Agenda provided detailing the time for the meeting and professional development activities (at least 6 hours)
- Sign-in Sheet for those employees attending
- Campus/departments must have this retreat on one business day.
- Counts as one of the two allowed staff meals each school year.
When submitting the expenditures, separate out the meal and activity, but the total must stay within the meal + activity total ($25 if it’s lunch and activity). Remember that all service/delivery fees are included in meal total calculation – not just the food. Gratuities are not allowed.

Meals are permitted **twice a year** for staff development/staff retreats and/or teacher/staff appreciation. Meals should not exceed the meal allowances as allotted for overnight travel—($15 for lunch, $26 for dinner).

For federal funds – no meals unless prior approved by the director of the program.
MEAL EXCEPTIONS

- If a principal requires employees to stay on campus for an extended duty day that includes a meal period, such as Parent Conference Night, Meet the Teacher, or Registration, then a meal may be provided.

- **DO** provide something inexpensive like a box lunch or pizza inexpensive.

- It must be noted on the PO and staff must be required to attend.

- **DO** keep a copy of the email that the principal sends to staff / teachers requiring attendance.

- **DO** have a sign in sheet to document attendance.

- **DO** stay within per diem allowances.
Refreshments can be provided for staff attending staff meetings; it is not required.
  - Tea, lemonade, water, cookies, brownies, popcorn

Light meals for staff AND community members can be purchased for committee meetings such as school site base or school safety.
  - Tea, lemonade, water, sandwiches, chips, pizza, etc.
  - **DO** follow per diem amounts for overnight travel.

Remember- 6497 for food/drink and 6399 for any cups, plates or supplies.
Length of Master Description-
- When you start a requisition the Description box in that screen is called the Master Description. Please keep this as brief as possible. Just list information you need to recognize the order at a glance. Any other details should be entered as a Narrative line item.

A contract MUST be selected.
- Please make sure that you select a contract when starting your requisition. If there are multiple contracts look at the description to make sure you are choosing one that matches the goods/services you are ordering. If you need assistance, please contact Purchasing.

Verify the contract listed on your quote matches the choice in Skyward.
- If you received a quote from the vendor, look at it to see if they list a contract for pricing. If they do, make sure to choose that contract when starting your requisition. If it is not an option, please reach out to Purchasing for assistance.
REQUISITION ETIQUETTE

**Requisition Information**

- **Batch Number:** 26
- **Description:** Cooking supplies for a science project where students will learn the importance of molecules and chemistry stuff at a college level in accordance with TEA # 11254 which states students must learn how to make an omelet without breaking a few eggs. This needs to be processed ASAP since it’s for something tomorrow and something else, just trying to get some extra words here. IMA FFE YMA YDA PPE Venti Grande Ok that’s enough.

<table>
<thead>
<tr>
<th>Requisition Number</th>
<th>Status</th>
<th>A/D Level</th>
<th>Batch Number</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Vnd St</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000271932</td>
<td>WIP</td>
<td>0</td>
<td>26</td>
<td>Supplies for Science event tomorrow</td>
<td>DELCOM GROUP LP</td>
<td>TX</td>
</tr>
<tr>
<td>0000271929</td>
<td>WIP</td>
<td>0</td>
<td>26</td>
<td>Cooking supplies for a science project where students will learn the importance of molecules and chemistry stuff at a college level in accordance with TEA # 11254 which states students must learn how to make an omelet without breaking a few eggs. This needs to be processed ASAP since it’s for something tomorrow and something else, just trying to get some extra words here. IMA FFE YMA YDA PPE Venti Grande Ok that’s enough</td>
<td>DELCOM GROUP LP</td>
<td>TX</td>
</tr>
</tbody>
</table>

**Attention:** CODY CANNON

- **Due Date:** 07/25/2021
- **Ship Date:** 07/26/2021
- **Ship Via:** Monday

**Vendor:** DELCOM GROUP LP

**Ship To:** SUMMIT HIGH SCHOOL, 1071 W TURNER MARES BLVD ARLINGTON TX 760

**Contract:** DIR-TSO-3858
REQUISITION ETIQUETTE

- Item/catalog numbers
  - Please enter any catalog or item numbers in the Catalog field. This makes it easier for the vendor to process your order since those numbers are separate from your Line-Item Description.

- Enter narratives as Narrative Line-Items, not a Merchandise Line-Item
  - Please enter any additional information as a Narrative Line-Item. When entered as a Merchandise Line-Item this can throw off the receiving record. It also will show up on various reports unnecessarily since it’s entered as Merchandise.

- Don't request invoices be sent to anyone other than AP
  - ALL invoices need to go to the Accounts Payable account. If you need a copy for any reason, please request it from them. Requisitions asking for invoices to be sent to anyone other than AP may be edited to remove that line or denied.

- If you reference a quote, attach a quote.
  - Please attach any quotes you used to your requisition. If you reference a quote, make sure to attach it or else your requisition may be put on pending or denied.
### Before

<table>
<thead>
<tr>
<th>Line ▲</th>
<th>Catalog Code</th>
<th>Description</th>
<th>Quantity</th>
<th>U of M</th>
<th>Unit Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td></td>
<td><strong>Catalog#657955AB</strong></td>
<td>1</td>
<td></td>
<td><strong>29.99000</strong></td>
<td><strong>29.99</strong></td>
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<tr>
<td></td>
<td>Desktop computer stuff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120</td>
<td></td>
<td><strong>Quote#AAA1234</strong></td>
<td>0</td>
<td></td>
<td><strong>0.00000</strong></td>
<td><strong>0.00</strong></td>
</tr>
<tr>
<td></td>
<td>Send invoice to <a href="mailto:someoneotherthanAP@misdmall.org">someoneotherthanAP@misdmall.org</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### After

<table>
<thead>
<tr>
<th>Line ▲</th>
<th>Catalog Code</th>
<th>Description</th>
<th>Quantity</th>
<th>U of M</th>
<th>Unit Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td><strong>657955AB</strong></td>
<td><strong>Desktop computer stuff</strong></td>
<td>1</td>
<td></td>
<td><strong>29.99000</strong></td>
<td><strong>29.99</strong></td>
</tr>
<tr>
<td>110</td>
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<td>0</td>
<td></td>
<td><strong>0.00000</strong></td>
<td><strong>0.00</strong></td>
</tr>
<tr>
<td></td>
<td>Send invoice to <a href="mailto:accountspayable@misdmall.org">accountspayable@misdmall.org</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
REQUISITION ETIQUETTE

- Federal/Amazon Quotes
  - Please electronically fill out the quote form. Most handwritten forms slow down processing and result in follow up contact. Typed entries are just quicker and easier to view.
  - Quotes should be for the exact same item (make/model). If this is not possible, your quote form must include a reason why.
  - Please do not print your quotes and then scan them back onto your computer. This also often makes it difficult to read and results in more phone calls/emails.
    - Utilize the 'Snipping Tool' built into Windows to make quick images of websites. If you need space than what it provides, 'print' the page as an Adobe PDF.

- Combine documents
  - Every staff member has access to an Adobe Creative Cloud license. Everyone here needs to have Adobe Pro DC installed on their workstation. This allows you to edit .pdfs as necessary.

- Align/Orient Documents
  - It does take a few extra clicks, but after combining your documents, take a moment to rotate them. We will sing your praises, and it will keep you from straining your neck when you refer to any of the documentation.
## REQUISITION ETIQUETTE

### Individual

**Attachments**

**Requisition Attachments**

**Available Attachments for Req Number 0000272274**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Entered By</th>
<th>Entered Date</th>
<th>Entered Time</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quotes</td>
<td>Amazon Mouse.PNG</td>
<td>Cody W Cannon</td>
<td>07/28/2021</td>
<td>9:04 PM</td>
<td>491 KB</td>
</tr>
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<td>Quotes</td>
<td>BestBuy Mouse.PNG</td>
<td>Cody W Cannon</td>
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<td>431 KB</td>
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<td>Cody W Cannon</td>
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</tr>
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</table>

### Consolidated

**Attachments**

**Requisition Attachments**

**Available Attachments for Req Number 0000272274**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Entered By</th>
<th>Entered Date</th>
<th>Entered Time</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quotes</td>
<td>Federal Wireless Mouse.pdf</td>
<td>Cody W Cannon</td>
<td>07/28/2021</td>
<td>9:06 PM</td>
<td>403 KB</td>
</tr>
</tbody>
</table>

### Wireless Mouse Example
The SharePoint Purchasing Hub has resources that can help answer your questions on common purchase vendors and pricing as well as access training materials and manuals.
TECHNOLOGY PURCHASES

Cody Cannon
Product Shortages

- Shortages are expected to continue for many Technology assets for the foreseeable future.
- Please make Technology related purchases as early in the year as you can.
- Your goal should be to order computers BEFORE Christmas break.
TECHNOLOGY PURCHASES

Coding

- **6396**- Physical computer hardware. This could be the computer itself or any related accessories (mice, keyboards, document cameras, flash drives, monitors).

- **6397**- Software licenses and warranties. This includes one-time purchases, or renewals.

- **6398**- Hardware and equipment that Technology does NOT manage. This would include things like Journalism cameras, lights, or microphones (that don't connect to the computer).
Adobe Creative Cloud

- The Technology Department is still covering the cost of all Adobe Creative Cloud subscriptions.
  - If you or an administrator currently have a subscription, you will not have to renew it. Technology is handling the transition. You shouldn't notice a change.
- Directions can be found in SharePoint
  - Adobe CC Procedure SharePoint (Web view)
Technology Recommended Items

- Approved items are listed in SharePoint by general categories.
  - Where possible prices will be listed.
    - Ecommerce items will not have pricing listed due to fluctuations. However, item and quote numbers will be available to make looking it up in Ecommerce as easy as possible.
  - Technology recommended accessories will be expanded in SharePoint to include webcams, headsets, microphones and more.
Technology Recommended Items

- The vendors listed below will also automatically receive your approved POs, so you don’t have to email them 😊
- This information may change and will be updated here.

<table>
<thead>
<tr>
<th>Global Asset</th>
<th>CDWG</th>
<th>Connection</th>
<th>Delcom</th>
<th>Apple</th>
<th>B&amp;H</th>
<th>Cesco</th>
<th>SHI-G</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chromebooks</td>
<td>Surface Devices</td>
<td>PC Accessories</td>
<td>PC Accessories</td>
<td>iPads</td>
<td>Cameras</td>
<td>Printers (1st)</td>
<td>Software</td>
</tr>
<tr>
<td>Desktops</td>
<td>PC Accessories</td>
<td>Software</td>
<td>AV Installations</td>
<td>MacBooks</td>
<td>Drones</td>
<td>PC Accessories</td>
<td>PC Accessories</td>
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<tr>
<td>Laptops</td>
<td>AV Accessories</td>
<td></td>
<td></td>
<td>Apple Accessories</td>
<td>AV Accessories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PC Accessories</td>
<td>Software</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AV</td>
<td>Printers (2nd)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Ordering

- Technology orders still require a Narrative stating the destination Campus/Department and End User.
- This is so the Technology Department can expedite the setup/delivery since they only see what is listed on the Purchase Order.
- Technology orders without this Narrative will be denied.
Please include this narrative with any new computer purchases.

When using Ecommerce use the Ecommerce Narrative option to add this.

Campus:

Recipient (first and last name):
Please include this narrative with any new software purchases/renewals.

When using Ecommerce use the Ecommerce Narrative option to add this.

Start: July 1st
End: June 30th
Term: 12 months
Staff: JonSoftware@misdmail.org
Software Changes

- Due to increased scrutiny of software purchases we will be requiring more information for new and renewal purchases than you may have provided in the past.
- A quote will be required, and it should list these two important items:
  - Term length. Specific start/end dates preferred, length of term in months if not.
  - Contract used for pricing. If the vendor is in Skyward on a Cooperative contract, their quote must reference that contract.
    - MISD bids start with a two-digit school year then three-digit number (23-004).
    - Cooperatives are listed by their name (BuyBoard, DIR-TSO, TIPS, etc.).
- If possible, list anyone responsible for the software (a manager, super user, etc.).
Software Changes

- This information is being used to manually create a 'contract' in our IonWave bidding system. These contracts will serve two main purposes.
  - Reporting- We can easily run audit reports regarding license terms without requiring a more complicated process in Skyward.
  - Renewal Reminders- The system will email Resources (whoever entered the REQ, and whoever else you list in your narrative) 90 days, and 45 days prior to expiration to remind you to enter a new requisition.
Order Status

- If you want to check on the status of a Technology order that does NOT have a receiving record, please contact the vendor directly. Common Tech vendor best contacts are listed HERE in the SharePoint.

- If you want to check on the status of a Technology order that DOES have a receiving record, please contact Jennifer Rooker at MISD Technology.
Technology Shipping/Receiving

- All deliveries go to Technology.
- Receiving in Skyward is done when each box has been opened, counted and checked for damages.
- Items that need asset tagged are tagged and entered into TipWeb and etched if needed.
  - Purchased from special funding are also marked with a special identifying dot
- Once order is complete it is assigned to your technician who will then.
  - Image all computer devices.
- Technician will deliver and set up equipment with End User.
- Once all devices are set up and working technician will assign to correct location/person device belongs to and will be signed for in TipWeb.
WE ARE HERE TO HELP!

Reach out to us through email or Teams:

Ed Harper – Director – edwardharper@misdmail.org
Lexy Bazarte – Purchasing Specialist – alexiabazarte@misdmail.org
Cody Cannon – Buyer – codycannon@misdmail.org
Toni Chadwick – Purchasing Specialist – tonichadwick@misdmail.org
Kristi Russell – Buyer – kristirussell@misdmail.org