PURCHASING SERVICES GUIDELINES

2024/2025

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Purchasing Services:

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COMMODITY ASSIGNMENTS

ROBERT ALDAMA, PURCHASING MANAGER II

Capital/Construction/Facilities Projects, Vehicles,
Formal Bids/ RFQs / RFPs,
CALcard Administrator

MELANIE GUTIERREZ, BUYER III

Bids/ RFQs/RFPs

Computers & Peripherals, Audio Visual Equipment, Classroom

Materials, On-line Subscriptions, Furniture, Early Learning & Care

Office Depot Accounts,
Nutrition Services,
Office & Technical Equipment,

Travel Made Easy

All District Travel is procured centrally through Purchasing Services.

In order to process Travel Requests the following must be submitted:

- Travel Request Form (#ACC-F014) SIGNED by all approvers submitted to Purchasing at least 60 days prior to travel date or as soon as the event opens registration.
- Escape Conference/Travel Requisitions created and submitted by the site and APPROVED by Budget.
- Backup (flyers, registration forms, and **approved travel request form**) scanned and **attached to the requisition(s).**

o Scan the total packet to Travel@scusd.edu for processing. (Please note any special instructions)

Vendor Recommendations

Chargeback Requisitions

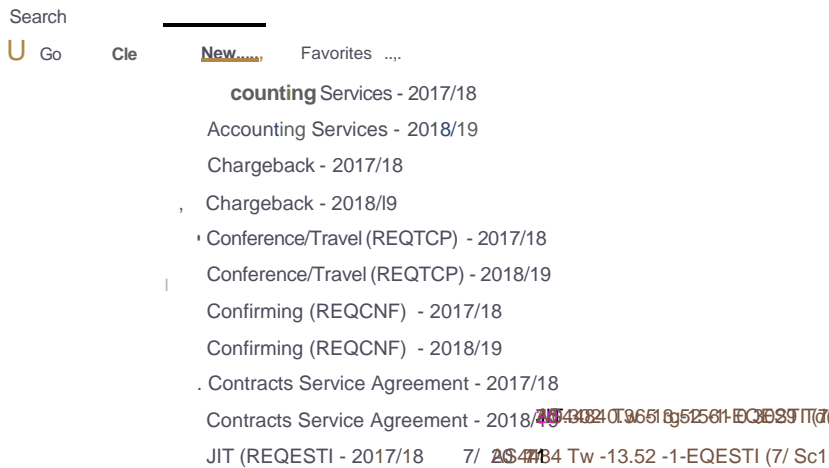***Note: All vendor requisition types can be created using the below process.***

Chargeback requisitions are used to set up a budget account that your online purchases and copier charges can be "charged back" to after the District has paid the bill in full. They can be increased or decreased as needed. Chargeback requisitions should only be used for the following vendors:

Home Depot (SupplyWorks)	**Vendor#313076**
Office Depot	**Vendor#113902**
UBEO (Ray Morgan)	**Vendor#118627**

To create a new Chargeback requisition you will need to fill out the **REQUISITION, ITEMS** and **ACCOUNTS** tabs.

- In Escape, under the **"Finance"** section click on **"Requisitions"** then on **"Vendor Requisitions."**

- From **"Vendor Requisitions"** click **"New"** and choose **"Chargeback"**

Search

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counting Services - 2017/18

Accounting Services - 2018/19

Chargeback - 2017/18

, Chargeback - 2018/l9

Conference/Travel (REQTCP) - 2017/18

Conference/Travel (REQTCP) - 2018/19

Confirming (REQCNF) - 2017/18

Confirming (REQCNF) - 2018/19

. Contracts Service Agreement - 2017/18

Contracts Service Agreement - 2018/19

JIT (REQESTI - 2017/18

- On the first tab, which is the **REQUISITION** tab, you will need to enter or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.** For most users, the location fields will default to the user's location. Only change the location code if you want y wa8 (e)]TJ 5 (o)]TJc 0.001 Tw 0.389 0 Td 0 y68 ( )-60 Tw 5 (oc)-0.8

Unit Price	Extended Cost	Asset	Qty Rcvd	Date Rcvd	Qty To Rcv	Catalog #

- Enter **Order Quantity: 1, Order Unit: Each, Unit price: the not-to**

Confirming Requisition

Confirming requisitions are used to pay a vendor or reimburse staff for an item or service that has already been received. Confirming requisitions are for items or services totaling **$400.00** or less. To pay for confirmed/received orders that

_____

Purchasing Requisition

Purchasing requisitions are the most commonly used, they are the standard requisition type. Examples of the commodities are: sports equipment, office supplies, novels and subscriptions.

To create a purchasing requisition, complete the **REQUISITION, ITEMS,** and **ACCOUNTS** tabs.

- From **"Vendor Requisitions."** click **"New"** and choose **"Purchasing"**
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCA2 (T)4.1 (S)]4 Td[L)( )Tjd[c)-3.8 (o)1.5 (n)-3.1 (fi)3.8993 -18993 C cAt-1 (l)0**

Contracts Service Agreement Requisition

Contracts Service Agreement (SA) requisitions are used for professional services such as: direct services to students, professional development, and entertainers/speakers as well as consulting or advice from specially trained independent contractors. They are not used for non-professional services such as maintenance or repair of equipment, nor are they used for license subscriptions which may include access to online training, which would use Purchasing and Technology requisitions, respectively.
*Please reference the Contracts Procedures BS-28 and Insurance Requirements BS-31, available on the Contracts Office department page.

To create an SA requisition, complete the **REQUISITION, ITEMS, ACCOUNTS,** and **ATTACHMENTS** tabs.
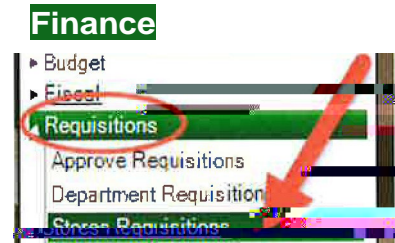
- From **"Vendor Requisitions."** click **"New"** and choose **"Contract Service Agreement"**
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- Next, click the **ITEMS** tab.
- From **ITEMS** click **"New"**
- **Order Quantity** is typically "1" but it could also be the number of hours or months of service or the number of installments the services will be paid in.
- **Order Unit** defaults to EACH or it may be changed to HOURS

<u>Warehouse/Stores Requisition</u>

Stores Requisitions are used to order supplies from the Warehouse. Items currently stocked in the warehouse include PPE such as masks, gloves, hand sanitizer, signs and other supplies needed for the mitigation of COVID-19 and germ prevention.

To create a Stores requisition, complete the **REQUISITION, ITEMS,** and **ACCOUNTS** tabs.

- From the Requisitions menu select **"Stores Requisitions"** and click **"New"**
- On the **REQUISITION** tab, fill in or confirm the **ORDER LOCATION, DELIVERY LOCATION,** and **COMMENT.**
- Next, click the **ITEMS** tab.
- From **ITEMS** click **"New"**
- Enter the **STORES ITEM#** by typing 99 {PPE) and then clicking the drop down arrow. A list of personal protection equipment and supplies will appear. Double click an item to add it to the requisition. Enter the quantity in the **ORDER QUANTITY** field.

New Stores Requisition

Requisition Item Accounts	,;istory		
.,:,pC,,, il·J,_.. UE,p,:d	**Save/New**	Save/Close **Q** Cancel	

EI **1- Ilem Order Informollon**

Stores Item //	99-05010
Order Quantity	
Available Qty	1I **21458**
Unit Price	!! **0.0000**
Extended Cost	!! **0.00**
Order Unit	!! **BOX**
Description	B **FAC MASK. DISPOSABLE (ADU T / SECONDARY 50cl)**
Line	!!

1B **2- Add/Updste Informstion**
IE -'. t,.;;; 1i -   - -. --

- Continue clicking **SAVE/NEW** to add additional items. Click **SAVE/CLOSE** once the last item is entered.
- Because PPE is being distributed at zero cost to the sites, at this point the requisition may be **SUBMITTED** without adding an account by clicking the Task button and selecting "Submit".
- If you receive an error and are unable to Submit the requisition without an account, click on the

How to Receive Online (ROL) a Requisition

When an order is delivered directly to your site/dept., rather than being received centrally at the Warehouse, the site/dept. is responsible for posting receipts in Escape. This process is called "Receiving Online" or ROL for short. Receiving Online is required for Purchasing, Technology, Textbook, and Contracts Service Agreement (SA) requisitions (these requisitions will all list the **Order Type as "PO with Receiving").** Receipts can only be posted for requisitions in **Printed or Ready for Payment status.**

To ROL a requisition follow these steps:
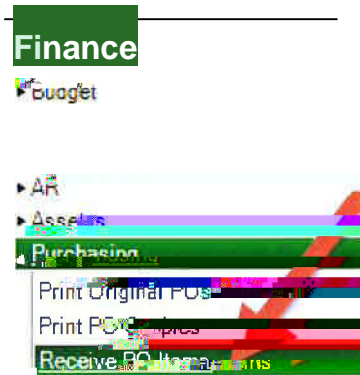
Lifecycle of a Requisition

1. **Who creates my requisitions? Is it the site's responsibility?**
    - Yes, this is the site's responsibility to create and submit their requisitions. Note: Rem5.1f(i)45.6o12 (9)3 l2)a985wTw-3.82(4)]TJ0(7.T)91.CTo1 0.c-0.(

4. **What does Purchasing do with the requisitions?**
   - Purchasing reviews to check for accurate descriptions, product numbers, cost, delivery location, and that preferred vendors are used
   - Ensures bidding and quotation requirements in District policy, Ed. Code and Public Contract Code are met
   - Prints the Purchase Order and sends it to the vendor (by email)

5. **How do I increase my oa4ffe**

<u>Warehouse Services</u>

a) Warehouse Services:
   i) Mail delivery:
      (1) Interoffice mail:
         (a) Food, interoffice mail and freight are scheduled for daily delivery
             (freight may be delayed on days with higher volume of food).
             Children's Centers have assigned days that they are serviced.
             Unions are to be picked up and or delivered as requested oni]TJ-aB5 07 0 ThT.

numbers can easily be transposed as letters).

 ii) All e-waste must have the approval from the board to be picked up from the warehouse for surplus.

 iii) Submit completed forms for approval to the Warehouse Supervisor, by email, fax, or interoffice mail box 835.

 iv) Once approved, the Warehouse will contact the

up:

  (1) All equipment be k3h38 (z)-5u8a(la)b5en(do)]TJ0 Tca0 Tw4p5y83b3T(h(l)F208(e

  (2) Please make sure that the product is in a location that can be accessible

campus, the plant manager and or staff are required to assist the

warehouse to l32dri(le)28 (et)1.2 (s)]TJ0 Tc 0 Tw 5.062 0 Td( )Tj0.001 Tc -0.001 Tw 0.279 0 Td(t

Tw 6.562 0 Td( )Tj0.002 Tc -0.001 Tw 0.437chedule and have other sites to

Please Nodistrict is to be or includes: **Please**
Purchasing Services any

 c) Universal

 i) Universal waste is now by Risk

  (1) You obtain and pick up

by using iatrdnet brox,

  (2) Once adbcu84lentdation has at reqdiesdr2g071. The Rishnagement staff will

 d) Request fop: i)

  If you wish for the Warehouse to transport any equipment to other sites, the request - filled emailed/ faxed/ or sent

   for   more information provided will help expedite pro

 e) Asset i) ass\ets with a must be tagged with an all Chromebooks and tablets must

requirements by the state.

ii) When an item is received at the Warehouse and it meets the criteria for asset tagging, the Warehouse staff will record the serial number and model and enter this information into Escape. If you have an item needing an asset tag, please contact Jason Holland, Warehouse Supervisor at 916-395-4186 ext. 460310 or email Jason-holland@scusd.edu for further instructions.

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Sacramento City Unified School District Procurement Procedures

| Any amount | California Multiple Award Schedule ("**CMAS**") contract established by Department of General Services. | **CMAS** contract for purchase of **goods, information technology and services**. Price in contract is a ceiling. Public Works services is limited to 50% of the total contract value. Limitation on carpet, resilient flooring, synthetic turf, lighting system over formal bid threshold other than for new construction (requires use of skilled and trained workforce). | Perform due diligence for products/pricing in CMAS base schedule. Agreement incorporating CMAS contract is required unless negotiate different terms. No Board resolution required. Board approves on consent.Cj | PCC 1024 Tm85nt1024 Tm85nt |

		required to be licensed and registered with DIR.	
$75 - 220K **Informal Bidding**	Notify all relevant contractors on the Pre-Qualified Contractors List and/or advertise in 4 trade journals at least 10 days before bid opening. Award to lowest responsive, responsible bidder or reject all bids. If no bids received, negotiate directly with a contractor. District reports to DIR/file PWC-100 form within 30 days of award or before work commences, whichever occurs first.	x Formal Contract x Prevailing wages x Electronic filing of certified payroll report x Payment/performance bonds from approved CA Surety x Insurance meeting required SCUSD limits. x All tiers of contractors required to be licensed and registered with DIR.	Contract submitted for Board approval as action item. If all bids >$200,000, Board resolution with 4/5 vote required to aw$de@ XpⱰontr%] e"o,Ão,PKÀ 5₵r%ₜ6uﬁX1ⱣFⱳₚ½ℚ P

original contract price (whichever greater)			
SINGLE/SOLE SOURCE AND EMERGENCY PROCUREMENT			