

WESTLAKE PURCHASING GUIDELINES

Purchases under \$1,000.00

- 1) Fill out **Purchase Order Request Form**, located at <http://westlake.alpinedistrict.org/finance> or a blank form in the Financial Office.
- 2) Make sure the form is filled out completely including:
 - a. Vendor name
 - b. Complete mailing address
 - c. Account to be billed
 - d. Shipping costs
- 3) Request **must** be e-mailed to the Administrator who oversees your department.
- 4) Give completed Purchase Order Request Form to the Financial Secretary to process. Make sure you check if you want to hand carry, mail, or fax the purchase order.

Purchases over \$1,000.00

Purchas orders can not be split to avoid doing bids. **In other words**, you can not purchase part of your order on one day and two days later purchase the remainder of your order.

Follow the steps 1-4 above to complete the **Purchase Order Request Form**.

Purchases over \$1,000.00 require three (3) separate of different bids. If you choose to do the bids yourself you must fill out a **Bid Sheet Form** and attach it to the **Purchase Order Request Form**. Located at <http://westlake.alpinedistrict.org/finance> or a blank form in the Financial Office.

If you **do not** want to obtain the bids yourself, fill out the **Purchase Order Request Form** in detail. The vendor would be Alpine School District Purchasing. Turn the forms into the Financial Office and the Financial Office will send a large district purchase order to the vendor.

Sole Source

If what you are ordering is considered a **sole source** (can not be obtained through any other vendor) you must fill out the top part of the bid sheet and check the box labeled sole source. The Financial Office will e-mail the **Bid Sheet Form** to purchasing for approval before ordering.

State Contract

If the vendor you are ordering from is on the **State Contract List**, you still must fill out the top of the Bid Sheet and check the box labeled State Contract. There is a place for you to put the State contract number. The list of state contacts and numbers can be located on the Alpine School District web site under departments and then select Purchasing.

Purchases over \$5,000.00

Purchases over \$5,000.00 can not be processed by the school. They must be sent to the Purchasing Department for them to create a large purchase order.

Fill out the **Purchase Order Request Form** steps 1-4 as outlined above and return to the Financial Office for processing.

Equipment items over \$1,500.00

Equipment items over \$1,500.00 which are purchased from school funds must have approval of the Board of Education before they can be ordered.

Fill out the **Purchase Order Request Form** as outlined in steps 1-4 above.

The Financial Secretary will send the forms to the District Office to be put on the agenda for board meeting. The Board meets once a month to act on business items, **plan ahead when ordering.**

Purchase Cards

Purchase cards can be used for purchasing supplies and other items under \$1,000.00.

If you have been authorized to use a purchase card:

- 1) Fill out the **Purchase Card Request Form** located at <http://westlake.alpinedistrict.org/finance> or in the Financial Office.
- 2) Have the form e-mailed to the Administrator who oversees your department.
- 3) If using vocational funds you need to e-mail it to the school vocational director, and they will get it to an Administrator. If buying any equipment, the form must be signed by Linda Murdoch and Clay Christensen before using.
- 4) If using the card for supplies or equipment over \$1,000.00 the above guidelines on dollar amounts for purchasing must be applied.
- 5) **Make sure that sales tax is not charged. If sales tax is charged on the receipt the cardholder is responsible to reimburse the sales tax to the school.**
- 6) Bring the receipt to the Financial Office so it can be attached to the request form.
- 7) **If you do not turn in the receipt, you will not be allowed to use a Purchase Card again! No Exceptions!**