



Amphitheater Public Schools

Procurement Manual

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PURPOSE AND OBJECTIVE

This manual is a formal internal communications document of Amphitheater Public Schools (APS). It is intended to assist schools sites with compliance with the most common purchasing situations. It is not designed to be a comprehensive document of all possible procurement situations.

COMPLIANCE

The Purchasing Department is responsible for compliance with Title 7, Articles 10 and 11, of the Arizona Administrative Code (AAC). These Articles apply to every expenditure using public monies by a school district, including federal assistance monies. The Uniform System of Financial Records for Arizona School Districts (USFR) defines the requirements for all purchases, including Title 7, and provides minimum audit standards for the procurement of goods and services. Additional compliance requirements are listed in Section D, Fiscal Management, of the Amphitheater Policy Manual. Links to all these resources are provided in *Appendix A – Definitions*. Compliance with Title 7, the USFR, and Section D of the Amphitheater Policy Manual is reviewed annually by the District’s auditors.

VIOLATION OF PROCUREMENT CODE

After-the-Fact Purchase Orders

If a school site orders materials, service or construction prior to a purchase order (PO) being issued, then an After-the-Fact procurement has occurred. It is illegal to use an After-the-Fact purchase order to cover a purchase made before a PO has been issued. After-the-Fact procurements violate the Arizona Revised Statutes, Article 10 of the Arizona Administrative Code (School District Procurement Rules) and the Uniform System of Financial Records. These procurements may result in disciplinary action being taken against the employee(s) involved in the violation of procurement rules.

Split Orders

Splitting orders between vendors to stay below procurement limits is a violation of School District Procurement Rules, and may result in disciplinary action being taken against the employee(s) involved in the violation.

PURCHASING DEPARTMENT’S WEBSITE

The following information is available on the Purchasing Department’s website:

- Current fiscal year spending (updated twice weekly)
- Last fiscal year spending
- Board approved sole sources
- Board approved textbooks (updated regularly)
- State and Mohave Web addresses
- Quote forms for 3 and 4 vendors
- Warehouse catalog
- Active bid information
- Request for Bid form
- Request for Proposal form

These forms are available at this address:

<http://www.amphi.com/departments/purchasing/schoolsite.html>

PURCHASES

The USFR sets forth the dollar amounts for procurement thresholds that school districts must follow. Because the dollar limits are determined across the entire district, it is imperative that the following procurement practices are followed. Failure to follow the thresholds listed below can result in the freezing of purchases from vendors and/or serious audit violations for the school district.

Quotes, Bids & Proposals

Guidelines for Obtaining Quotes, Bids or Proposals

If the **total cost** of goods and/or services purchased from a particular vendor in a single fiscal year will be:

- Less than \$300: No quote or bid is required, but as much competition as is practical should be used
- More than \$300 and less than \$1,000: A minimum of three oral quotes is required (documented by a memo to Purchasing)
- At least \$1,000 and no greater than \$33,689: A minimum of three written quotes is required (documented by a memo to Purchasing)
- More than \$33,689: A sealed bid or proposal must be obtained by Purchasing

Multiple Year Procurements:

Purchases that span multiple fiscal years must use the total expenditures over the multiple years in determining what procurement method or documentation is required.

The AAC limits school district contracts to five years. Each Bid, Proposal or Contract must be written as a One-Year award with up to four additional One-Year renewals.

Quotes are Obtained by Schools

Schools should review the active bid awards that are listed on the Purchasing Department's Web address, along with the goods and services they provide. These commodities have already gone through the bid process, and therefore will not require additional competitive quotes or bids.

Schools may request pricing from a single vendor for budget purposes and to determine what level of procurement documentation will be required.

Each school should then determine the amount of spending for that vendor by reviewing the spending reports for previous and current fiscal years that are located on the Purchasing Department Web address, shown in *Appendix D – References and Sources for Additional Information*.

When obtaining quotes, schools should:

- Let the vendor know it is competitive
- Ask the vendor to include the shipping charge as a line item on the quote response
- Submit vendor quotes and a quote recap sheet to Purchasing as attachments to requisitions

Documentation of No-Quotes – If no quotes are received in response to requests from schools, this fact must be documented, and will count as a valid quote within the written threshold. If more than one no-quote is to be used in meeting the minimum number of quotes required, a minimum of 5 vendors must be contacted, with their responses documented.

Bids are Obtained by the Purchasing Department

The Purchasing Department will work with end users to identify goods and services requiring sealed bids, and will initiate the bid process. When requesting that the Purchasing Department begin the bid process, schools should provide as much information as possible about the good or service requested, along with a list of potential vendors who might provide this good or service.

Sealed Bid Timeline

Allow at least thirty days for Purchasing to issue a bid, receive vendor responses, and obtain Governing Board approval for a bid award. Sealed bids may be renewed annually for up to four additional one-year periods for a total of five years.

Requests for Bids (RFB)

The Purchasing Department will issue a Request for Bid when there is a known quantity required, for a specific product or service, and price is the *sole consideration*. Be sure to reference the bid number on any requisitions.

If a Request for Bid is required, please complete the Bid form, available on the Purchasing website, and submit it to the Purchasing Manager.

Requests for Proposals (RFP)

There are instances where factors other than price need to be considered for a bid award. In this situation a Request for Proposal is a more appropriate option. Factors to consider may include vendor qualifications to provide the product or service required, availability of after-hours service, product quality, training availability, delivery timeline, etc. A scope of work defining the good or service required, the evaluation criteria, and a list of possible vendors is required by the Purchasing Department prior to initiating a Request for Proposal.

If a Request for Proposal is required, please complete the Request for Proposal form, available on the Purchasing website, and submit it to the Purchasing Manager.

State of Arizona and Mohave Contracts

The Purchasing Department may also use State of Arizona and/ or Mohave Educational Services (MESCS) bid awards if it is in the District's best interest. When goods or services are requested through a Mohave Educational Services or State of Arizona bid award, the bid number shall be

referenced on the requisition. Websites for the State of Arizona Procurement and MESC are listed in *Appendix D – References and Sources for Additional Information*.

When you order using bid awards, be sure that the items you are ordering were included in the initial bid with the vendor. If they were not, you must get separate quotes for the non-included items.

Be aware that all purchases, whether done independently or through a cooperative purchasing agreement, must be done in accordance with School District Procurement Rules.

Intergovernmental Agreements

The Purchasing Department has a number of intergovernmental agreements (IGA) which allow the District to obtain goods and services from contracts that have been bid and awarded by governmental agencies other than the District. The Office Depot Contract L050708 is the primary Purchasing IGA utilized by the District.

Sole Source Purchases

Governing Board-approved sole source vendors/commodities do not require competitive bids or quotes. Sole source commodities and the supplying vendors may be found at the Purchasing Department web address. All sole source purchases must be approved by the Governing Board.

Textbooks

The Governing Board has approved specific textbooks for District use. Textbooks may be purchased directly from the publisher(s). Keep in mind, though, that the Purchasing Department often is able to locate used and/or reconditioned textbooks at a considerable discount. You will be notified if used/reconditioned books are available, and their cost. It will be the school's decision how to proceed. A list of Governing Board-approved textbooks is on the Purchasing Department web site listed in *Appendix D – References and Sources for Additional Information*.

Independent Contractors

When services are provided by individuals who do not have a W-9 Business Tax ID Number, the individual is required to complete an Independent Contractor Form. A completed and signed agreement shall be submitted as an attachment to the requisition. A copy of the Independent Contractor form is available on the Purchasing Department's web site.

Blanket Purchase Orders

Blanket purchase orders are to be used for purchases of a recurring nature, over a defined period of time, at a specified expenditure limit. They can be set up to be valid for any time period, up to the end of the fiscal year. Blanket purchase orders must be with vendors who have gone through the proper procurement procedures. They are often used for office and custodial supplies.

When you order using a blanket purchase order, be sure that the items you are ordering were included in the initial quote or bid with the vendor. If they were not, you must get separate quotes for the non-included items.

Requisitions for blanket purchase orders must contain the funding amount, the expiration date, and who is authorized to use the purchase order.

When using a blanket purchase order you must send Accounts Payable all the receivers or invoices that came with the shipment. Be sure to sign and date this paperwork, and put the Purchase Order number on the paperwork as well. Use the date the item was received when dating the paperwork. This documentation must be sent to Accounts Payable in a timely fashion after you have received the order or the vendor will not be paid.

Year-End and New-Year Purchases

Current year requisitions for orders from out-of-state vendors are accepted through the third week of May. Current year requisitions for in-state vendors will be accepted through the first week of June. There may be some exceptions where material is in stock and available for immediate delivery. The Chief Financial Officer must approve all current year orders placed after the first week of June. Items must be received by June 30th to be included in expenditures for that year. Items received after June 30th will require a new year's purchase order, and will be paid out of the new fiscal year's funds.

The Finance Department opens access to new-year requisitions around the first of May. New-year orders for textbooks and athletic uniforms shall be placed in a timely fashion. Inventory is first-come, first-served, as K-12 schools nationwide are placing orders for these commodities. The office and janitorial supplies new-year order entry is also open no later than the first of May.

It is important to note that material ordered against new-year purchase orders may not be received prior to July 1st. Be sure to let vendors know this when you are preparing a new-year purchase order.

DELIVERIES

Direct Deliveries

The District will implement a **new procedure** beginning August 2008. Orders with a total value less than \$1,000, with no individual item exceeding \$100, can be shipped directly to the ordering site via UPS or FedEx, bypassing the Warehouse. This may shorten the timeline for delivery, and allow the Warehouse to reduce delivery expenses. All capital items and material requiring special handling will continue to be received at the Warehouse for inspection and site delivery.

In addition, schools may waive Warehouse delivery – with the understanding that direct deliveries must be reported promptly to Accounts Payable. Please send Accounts Payable the original paperwork received with the delivery, signed, with the date received and the purchase order number noted on the paperwork. Be sure to check off all the items and quantities. If there

are any discrepancies or damage, contact Purchasing at ext. 3714 for resolution. Keep a copy for your records of all submitted paperwork.

If it is determined that a site is not promptly forwarding all delivery documents, properly checked, signed and dated, to Accounts Payable, that site will no longer be allowed to accept direct deliveries of orders.

Warehouse Deliveries

The Warehouse will receive all deliveries over \$1,000, or with individual items exceeding \$100 – with the exception of large bulk orders such as sand, gravel, and other landscaping material, perishable items, blanket purchase orders, large furniture deliveries, etc.

SURPLUS PROPERTY

Pickup of Surplus Property

The Warehouse is responsible for picking up surplus property for disposal. Please contact the Warehouse Lead at ext. 3701 to request a pickup. A form (available from Graphics & Printing) will need to be completed, signed by the site administrator, and included with the items to be picked up.

Surplus Equipment

The District Warehouse has surplus equipment available for use by the schools. If you require a chair, desk, file cabinet, student desk, etc., please contact the Warehouse. If stock is available, the requested item will be delivered to your site at no charge.

INSURANCE CLAIMS

The Purchasing Department is responsible for filing property loss claims (District property only) with the District's insurance carrier. Please contact the Purchasing Manager if you have a loss. If the loss is due to vandalism or burglary a police report will be required.

CAUTION REQUIRED

You may be contacted by less-than-honest individuals asking for your delivery address, promising to send a free sample for your evaluation. The majority of the time an invoice follows requesting payment. You may also receive unsolicited material. Please contact the Purchasing Department if you are contacted in this manner or receive unsolicited materials.

EMPLOYEE REIMBURSEMENTS

Employee reimbursements are strongly discouraged. Reimbursements may be made only if the item(s) are not available through normal Purchasing channels. Employee reimbursements are not a substitute for proper planning.

If employees do purchase items with their own money, they must still follow procurement guidelines. In addition, requisitions must be obtained prior to any purchase or any reimbursement request. Employees who fail to follow the procurement guidelines will not be

reimbursed for their purchases, and the items or services purchased will be treated as donations to the District.

PURCHASING FOR PERSONAL USE

No employee may purchase goods or services for personal use in the name of Amphitheater Public Schools.

No employee may sell goods or services for private gain to students or other employees on school premises or via District computer networks.

No employee may use his/her position with the District to solicit, directly or indirectly, the purchase of supplies, services or equipment at special discounts for private use from any school district vendor.

Any person using their employment position or influence at Amphitheater Public Schools for the purpose of obtaining goods or services for personal benefit or the personal benefit of others shall be subject to disciplinary action up to and including dismissal and possible criminal charges. Such activities shall include, but are not limited to:

- A. Purchases at discounted rates not available to the general public; or
- B. Acceptance of goods and services at no or reduced cost; or
- C. Purchases with the intent of avoiding sales taxes

It is permissible to obtain goods and services for personal use at discounted rates where suppliers typically offer educational discounts to employees of the District. Such discounts are characterized by being made available to all employees regardless of position or influence. Employees are responsible for personal transactions with vendors, including sales tax. Purchase arrangements shall not be made through the use of District purchase orders.

ETHICS

The District's Governing Board members and District employees shall not use their offices or positions to receive any valuable items or benefits that would not ordinarily accrue to them in the performance of duties, if the items or benefits are of such value or character as to manifest a substantial and improper influence upon the performance of their duties. It is the duty of the District's Governing Board members and District employees to maintain professional ethics at all times. This policy should not be construed to prohibit District Governing Board members and District employees from accepting inexpensive novelty advertising items and holiday gifts or occasional business lunches.

COMMON PURCHASING PROBLEMS

The following list may help highlight some of the problems with requisitions that are often encountered by Purchasing. Please do what you can to avoid creating these situations:

1. Requisitions do not match the Quote Form.
The Quote Form is available on Purchasing's website, with versions for both 3 and 4 vendors. When filling out this form, be sure to enter freight and tax information accurately, so the bottom line number on the Quote Spreadsheet reflects the total of all the charges, including freight and taxes, that will be on the PO. This number should be the same as the total of your requisition.
2. Quotes are not provided to Purchasing Department
3. No documentation is provided on book orders (such as quotes or Board-Approval date)
The Board Approval dates for textbooks are available on Purchasing's website (click on Board Approved Textbooks).
4. Missing information on new vendors (W-9 and contact phone and fax numbers)
5. Tax is charged on non-taxable items, such as Shipping and Handling
If one of the items you are ordering is non-taxable, such as food, labor and services, library books, or shipping and handling, no tax should be charged on this item.
Go into the tax area for that line item and set it at zero calculation.
6. Requisition has not been approved by end user
7. Requisitioner has used the wrong pricing (usually using a last-year catalog)
8. Requisitioner has not provided enough information about an item, such as color choice.
This is especially difficult to resolve during the summer months, as Purchasing may not be able to reach employees for answers during that time.

Appendix A – Definitions

Advantageous to the school districtin the best interest of the school district; this does not necessarily mean the lowest bid/cost.

Audit Documentation.....sufficient evidence obtained through documentation, observation, examination, audit. This includes tests and client assertion.

Maximum practicable competitionall specifications shall seek and promote overall economy for the purposes intended and encourage competition in satisfying Amphitheater’s need; they shall not be unduly restrictive

Procurementbuying, purchasing, renting, leasing or otherwise acquiring any materials, services, or construction. Includes all functions related to these activities.

Responsible bidder.....a person who has the capability to perform the contract requirements, and the integrity and reliability which will assure good-faith performance

Responsive biddera person who submits a bid which conforms in all material respects to the invitation for bids or requests for proposals.

Appendix B – Excerpt from Audit Compliance Questionnaire

	YES	NO
4. Were prenumbered and numerically-controlled purchase orders prepared for all District expenditures (except for exempted items such as salaries and related costs, utilities, and in-state travel, or when a written contract was otherwise prepared), and were they approved by personnel authorized by the Governing Board before issuance to vendors?		
5. Were purchase orders prepared before the goods or services were received?		
6. If the District used blanket purchase orders, did they cover a definite time period and specify an expenditure limit?		

For Expenditures questions 7, 10, and 11, the audit firm must select and test a specified number of transactions based on the District’s ADM as shown in the table below. The listed sample sizes represent the minimum level of required test work. The audit firm should use their judgment in determining whether a larger sample is needed.

District ADM	Sample Size
<1,000	5
1,000-5,000	10
>5,000	15

In the parentheses provided in questions 7, 10, and 11, indicate the actual number of transactions tested. If all transactions were tested, indicate such in the “Comments” column. For question 7, at least 40 percent of the number of expenditures tested must be for purchases made through competitive sealed bids and at least

40 percent of the number of expenditures tested must be for purchases made through competitive sealed proposals. If these 40 percent thresholds cannot be met due to an inadequate population size, the audit firm must test all expenditures made through competitive sealed bids or made through competitive sealed proposals. Of the expenditures selected above, at least one expenditure should be for traditional construction (design-bid-build), and at least one expenditure should be for construction-manager-at-risk, design-build, job-order-contracting (question 7.b.13), or qualified select bidders list (question 7.c), if applicable.

7. Based upon review of (____) expenditures [___ invitation for bids (IFB’s) and ___ requests for proposals (RFP’s)] for the procurement of construction, materials, and services that met or exceeded the amount requiring sealed bids, as calculated by the Arizona State Board of Education (ASBE) in accordance with A.R.S. §15-213, did the District follow the School District Procurement Rules (R7-2-1001 et seq)?		
a. For purchases made through competitive sealed bidding, did the District:		
1) Give adequate notice of the IFB? R7-2-1022		
2) Compile and maintain a list of prospective bidders (that requested to be added to a list of prospective bidders, if any)? R7-2-1023		
3) Issue the IFB at least 14 days before the time and date set for bid opening unless a shorter time was determined necessary, and did the IFB include all required information, including purchase specifications? R7-2-1024		

- 17. Were receiving reports prepared for all goods and services received, except for exempted items? Was the date of receipt, quantity received, and signature of the recipient noted on each receiving report?
- 18. Did the accounts payable function include maintaining documentation and matching receiving reports, vendor invoices, and purchase orders before payment?
- 19. Did the Governing Board establish and maintain formal, written policies in accordance with USFR pages VI-G-7 and 8 governing the use of credit cards?

For question 20, the audit firm must judgmentally select at least 3 monthly credit card (including gas card) statements in total (from different cards/accounts, if the district has more than 1 card/account) and scan the statements for unusual or inappropriate purchases, or purchases not made within the District’s policies and procedures. Then judgmentally select at least 5 individual transactions in total to review from the statements selected above, in addition to any unusual or inappropriate purchases noted on the statements selected.

- 20. Based on a scan of the statements and a review of the judgmentally selected credit card transactions, were credit card purchases only for expenditures requiring immediate payment, for authorized school purposes, within the dollar limits set by the Governing Board, and supported by appropriate receipts that clearly identify the employee making the purchase? (Note: If the answer is No, the Comments should clearly indicate which of the above requirements were not complied with.)
- 21. If the District used purchasing cards (p-cards), were policies and procedures in place to monitor transactions and identify misuse (including ensuring transactions were for authorized school purposes, within dollar limits set by the Governing Board, and limited to applicable vendors)?

For question 22, the audit firm must judgmentally select at least 3 monthly p-card (including gas card) statements in total (from different cards/accounts, if the District has more than 1 card/account) and scan the statements for unusual or inappropriate purchases, or purchases not made within the District’s policies and procedures. Then judgmentally select at least 5 individual transactions in total to review from the statements selected above, in addition to any unusual or inappropriate purchases noted on the statements selected.

- 22. Based on a scan of the statements and a review of the judgmentally selected p-card transactions, were p-card expenditures only for authorized school purposes, within dollar limits set by the Governing Board, limited to applicable vendors, and supported by appropriate receipts that clearly identify the employee making the purchase? (Note: If the answer is No, the Comments should clearly indicate which of the above requirements were not complied with.)
- 23. Were warrants compared to the applicable voucher and warrant register before distribution?
- 24. Were vouchers and supporting documentation, including invoices, stamped “paid” or otherwise marked to help prevent duplicate payments?
- 25. Did the District prepare, for all levy funds, a list of liabilities by fund and program for goods or services received but not paid for by June 30 and file an Advice of Encumbrance based on the list with the CSS by July 18?
- 26. Was the amount encumbered on the Advice of Encumbrance for each levy fund equal to or less than the fund’s unexpended budget balance?

Appendix C – How to Generate a Requisition in FinancePlus

The following instructions are excerpted from the FinancePlus Training Manual. Please refer to that manual if you would like further instructions – including screen shots illustrating the steps described.

ENTERING REQUISITIONS

When you want to work with requisitions, follow the menu path *Applications/Purchasing/Requisition Processing/Requisitions*. This will bring up the Requisitions Record Center. The Record Center can be used for many different purposes. From this point you can generate a requisition, review, change, delete and print a requisition.

To enter a new requisition, click on the New Page icon. This will bring up a blank requisition. The system will automatically generate a requisition number. Write it down!

Continuous Checkbox

Note the Continuous checkbox on the form. Depending on how many requisitions you are planning on doing, you may want to uncheck the box. If you are only doing one requisition, you may decide to uncheck this box and when you have completed the requisition, you will automatically be returned to the record center.

If you leave it checked, once you save a requisition, FinancePlus will take you directly to another new requisition form. These Continuous checkboxes will be available for most new forms and in search results – they all serve the same purpose.

Start by filling in your location number, by either just typing it in or using the drop-down list arrow at the right of the field. Tab down to the vendor field and either enter the vendor number or click on the magnifying glass, which will bring up the Vendor Search screen.

Vendor Search

To do a vendor search, fill in as many of the fields with as much information as you have available, or need to use in order to pull up the vendor you are looking for. Remember to use your wild card characters if needed (? and *). Click on the Find button and the system will search for your vendor.

Once you have found the correct vendor number, highlight it and then click the OK button. This will close the Vendor Search box, and insert the vendor number in the requisition.

Continue filling in the Comments, Buyer, and Attention fields. The Ship To field also has a drop-down list option which you can use to select your Ship To address.

Click the OK button. This will take you to Line 1 of the requisition.

Notice how the tabs at the top of the Requisition form now show Header and Line Item (1 of 1). In the lines of the requisition, fill in the description field with the item you are ordering. Continue tabbing through and filling in the measure, quantity and unit price.

Adjusting the Tax Info

When you get to the Tax Total field, if the tax rate or amount is not correct, click on the calculator button in the Tax Total field. This will bring up the Taxes calculator.

Fill in the percentages or the amount in the appropriate fields, and click OK. This closes the Taxes calculator, and returns you to the requisition with the appropriate amount entered.

Distribution Method

The Distribution Method field is used for splitting your line item between multiple budget codes. It gives you three options for splitting your line: Amount, Percentage, or Quantity. These are explained below.

If you want to split the line item, *be sure to select your method now*, before going down into the budget code area. If you are not splitting the line item, just tab past the field, leaving the default option Amount selected.

Budget Code and Distribution Entry

Continue pressing Tab until it takes you to the budget code field in the bottom section. Fill this in with the appropriate codes for your school and/or department, and the item you are ordering.

If you are charging this line item to only one budget code, click OK, and you will be taken to the second line item of the requisition. Then proceed as detailed below under *Add More Line Items*.

Multiple Codes for One Line Item

If you wish to charge this purchase to more than one code, you can distribute it by amounts, percentages, or quantities. The Distribution Method field right above the budget code section is where you choose the option you wish to use.

You should have already selected the method, but if you haven't, you will need to press Back and start your line item again. This will take you back to the Header and erase all of your entries on this line item (but not the line item page itself).

Note: Even though pressing Back seems to allow you to edit the Distribution Method field, you will not be able to progress into the Budget Code entry area. Look at the bottom of the screen for an error message.

To enter multiple budget codes on one line item (after the desired Distribution Method has been selected), fill in the first row with the appropriate codes for your school and/or department, and the item you are ordering, tabbing between fields.

The system will then take you to the appropriate field for your distribution method. Enter the percentage, quantity, or amount you wish to apply to this budget code, then tab into the next row and continue the process. Keep an eye on the messages at the bottom of the screen, if you are having trouble.

Note that the column heading for the fifth column changes from Percentage to Quantity, if you have chosen Quantity as your Distribution Method.

Hints

Be sure to check the bottom of your screen for hints about what to enter in each field, as well as error messages which will alert you to changes that need to be made on your requisition. For instance, if you have pressed OK and the screen does not advance to the next line, look for an error message at the bottom of your requisition screen. You may have entered an incorrect code!

Saving Line Item

After you finish entering the first line item, click OK, and you will be taken to the second line item of the requisition.

Multiple Line Items

Enter single or multiple codes in your line item as described above, until you are done. Notice that each time you enter a line item and press OK, the tab at the top of the form will increment to reflect the updated line item number.

When you are done entering your lines, click the OK button. This will again take you to a new, blank line item screen. Now click the Back button to take you back to the Header.

This screen will now show you a summary of the line items that you have entered.

From here you can do several more things as needed:

Add More Line Items

You can add more lines, if necessary, by clicking the Add Item button.

Text/Notes

You can also add text to further explain your requisition, and any unusual circumstances related to it. To add text, click the Text button (bottom button on the right hand side). This will bring up the Text box.

After you have entered the text, press OK. You will note that the Text icon in the body of the requisition form now has a Text icon (see below). This shows that the requisition has a text note attached to it.

REVIEWING REQUISITIONS

If you want to go back in and review your requisition after you have just finished entering it, use the tabs at the top of the form, or click the Select Detail Items button and double click the line item that you wish to review. Whichever way you use, the scroll buttons at the top will let you move easily through the various line items.

Once you are sure you are done with the requisition, make sure you are on the Header tab and click Save.

You will then be prompted to print the requisition. Choose whichever option you prefer.

CHANGING REQUISITIONS

To view or change any requisition that has already been saved, you will need to go to the Record Center (where you created it) and Search for it.

Searching

Navigate to the Requisitions Record Center (*Applications/Purchasing/Requisition Processing/Requisitions*).

Fill in the search criteria for the requisition you want. You can search based on any of the fields shown. The more fields you fill in, the narrower your search will be. Click the Find button.

You will now see the summary page showing the details of the requisitions your search found.

Double-click on your requisition, or highlight it and click OK. This will take you to a screen showing the details of the requisition.

Making changes

To make changes to a requisition after locating it, tab to or click in the field you want to change and correct the information.

Once you have made all desired changes, return to the header tab and save the requisition.

DELETING REQUISITIONS

To delete a requisition, you will need to first navigate to the Requisition Record Center and do a search to find the requisition.

Once you have found the requisition you want to delete, highlight it and click the Delete icon on the toolbar.

The Confirmation dialog box will then come up.

Click Yes to confirm the deletion (or No or Cancel if you've changed your mind!)

PRINTING REQUISITIONS

Go to *Applications/Purchasing/Requisition Processing/Print Requisitions*.

This will bring up the Print Requisitions dialog box.

Choose Print Requisitions or Reprint Requisitions, and click OK. Fill in the appropriate fields and click OK. You can use range notations to print multiple requisitions at one time.

When the dialog box appears, click Yes to continue.

You will then be taken to the Print dialog box.

If you want to print, press OK.

If you choose to print to a file, the requisition will be saved to the My Documents tab on the Home Page.

If you choose to print to screen, the requisition will open in Adobe .pdf format, where you can navigate through it, view it in various ways, and save it to file as a .pdf document.

Choose your desired Destination and click OK.

The Print Requisitions dialog box can also be accessed from the Print Requisitions button on the Record Center.

Appendix D – References and Sources for Additional Information

Title 7 of the Arizona Administrative Code:

http://www.azsos.gov/public_services/Title_07/7-02.htm

Arizona Auditor General

Uniform System of Financial Records (USFR):

http://www.azauditor.gov/manuals_schooldistrict.htm

Amphitheater Public Schools Policy Manual

Section D:

<http://lp.ctspublish.com/asba/public/lpext.dll?f=templates&fn=main-h.htm>

Purchasing Department Info:

<http://www.amphi.com/departments/purchasing/schoolsite.html>

State of Arizona Department of Administration

Contract Information:

<http://www.azdoa.gov/spo/contract-information>

Mohave Educational Services Cooperative (MESC):

http://208.186.74.93/FMPro?-DB=product_finder.fp5&-Format=vsearch.htm&-View