

Procedures for Direct Delivery to SCHOOL SITES ONLY

In order to address the need for expedited delivery of special orders to schools, direct delivery to school sites has been implemented **as a trial** while we continue to explore potential options for Just-in-Time delivery. Below is a summary of the process and explanation of site responsibilities for direct delivery of special orders to schools.

- 1) Site office staff will submit Purchasing requisition following the current process (no change).
- 2) Purchasing will issue a purchase order to the vendor (no change to current process).
 - a. The purchase order will specify the school site address as the delivery location rather than the district warehouse (unless the order includes items to be tagged for inventory or that require special handling/assembly, etc.).
 - b. Purchasing will e-mail the “Receiving” copy of the purchase order to the site for their records.
- 3) The vendor will deliver the order directly to the school site via various delivery methods (UPS, FedEx, Vendor truck, USPS, etc.).
 - a. **IMPORTANT:** Do not let any staff or teachers open any boxes or remove any items from the delivery until after it has been verified and paperwork has been completed by office staff. It is recommended to store all deliveries in a **SECURE** location until office staff has a chance to check the order (no more than 3 days after delivery).
 - b. Please pay careful attention to all mail and deliveries received at the school. Sometimes an envelope or small package that appears to be routine mail may actually include an order and will require receiving paperwork.
 - c. Signatures are required for all deliveries. Verify # of packages received prior to signing for the delivery.
- 4) The school site will be responsible for checking the order to verify if all items are received and in good condition.
 - a. Compare the delivery to the “Receiving” copy of the P.O. that was e-mailed to the site. Verify if all part #s match, if the quantities are correct, and if there are any damages.
 - b. The attached “Purchase Order Receiving Report” must be completed & e-mailed to receiving@cajonvalley.net **within 3 business days of receiving order**. The report must include details of any missing, damaged or inaccurate items.
 - c. It is critical this report is provided ASAP so the vendor invoice can be processed for payment.
 - d. Purchasing will contact the vendor regarding any discrepancies noted on the report to request status of missing items or replacement of damaged items. Please do not contact the vendor directly, as this may result in duplicate requests.
 - e. Warehouse staff will pick up damaged or inaccurate items for return to vendor. The vendor is to e-mail the invoice to invoices@cajonvalley.net. No invoices should be sent to the school directly. However, if you receive an invoice, please forward to invoices@cajonvalley.net immediately.

Purchase Order Receiving Report

Purchase Order #: _____ Vendor: _____
Site: _____ Completed by: _____

This form is to be completed & emailed within 3 days of receiving an order directly from a vendor. Compare the delivery to the "Receiving" copy of the P.O. that was emailed to the site. Then complete this form. This information is to be provided ASAP as the vendor's invoice cannot be processed for payment until the site has verified receipt of the order.

Option #1 (Complete Order):

_____ The order has been received in full. The delivery is complete, accurate and in good condition other than as noted in the discrepancy section below.

Option #2 (Partial Order):

of Packages Received: _____

_____ A partial order has been received. The delivery is not complete, but the received items are accurate and in good condition other than as noted in the discrepancy section below. **ONLY** the items on the attached pack slip have been received. If no pack slip is available, list below the items that have NOT YET BEEN RECEIVED:

Qty: _____ of Line Item #: _____	Qty: _____ of Line Item #: _____
Qty: _____ of Line Item #: _____	Qty: _____ of Line Item #: _____
Qty: _____ of Line Item #: _____	Qty: _____ of Line Item #: _____
Qty: _____ of Line Item #: _____	Qty: _____ of Line Item #: _____
Qty: _____ of Line Item #: _____	Qty: _____ of Line Item #: _____
Qty: _____ of Line Item #: _____	Qty: _____ of Line Item #: _____

Discrepancies (Damaged or Inaccurate Items):

_____ The order has been received, but one or more items are damaged or inaccurate. The items listed below are NOT APPROVED for payment. Please re-pack **ONLY** the damaged or inaccurate items in original packaging and have ready for pickup in the front office. Warehouse staff will pick up the damaged or inaccurate items. Do not send via district mail. **Purchasing will contact the vendor to coordinate returns/replacements. Please do not contact vendor directly.**

Qty: _____ of Line Item #: _____
Description of Issue: _____
Qty: _____ of Line Item #: _____
Description of Issue: _____
Qty: _____ of Line Item #: _____
Description of Issue: _____

Please email this completed form with all delivery paperwork attached (packing slip, etc.) to: receiving@cajonvalley.net within 3 days of receiving any order from a vendor (not via warehouse delivery). Please provide the Purchase Order number in the subject line of your email.