



## Checklist of Items to include when submitting Purchasing Requisitions

Please provide complete, accurate, thorough information on each requisition. Without enough detail, the order cannot be processed and time spent requesting clarifying details results in order delays. To assist us in expediting orders and ensuring order accuracy, please include the following detail in your requisitions:

1. For product ordering information, check the Purchasing Department's website under the Product & Pricing Guide page for information on district standards, competitive bids, and commonly requested products: <http://www.cajonvalley.net/Page/11411>. If you need assistance finding order information, please contact the Buyer assigned to that commodity.
2. **Vendor:** Please select the vendor from the drop-down menu. If the vendor is new and you have been in contact with them, please request a W-9 form and electronically attach to your requisition (see example). In this case, use "ADD NEW VENDOR" in the vendor field. If you don't have any specific vendor in mind, select "BEST SOURCE" from the drop-down.
3. **Account Number:** Use the correct object code for the item you are purchasing. For example: 4300800 for software, 4400900 for equipment, 4400800 for technology equipment. These account numbers determine which approver the order is routed to. If the wrong object code is used, the req will need to be re-routed for additional approvals, causing delays. If you need help determining the correct account, or need any new account numbers added, please contact the Accounting Department.
4. **Qty Field:** Specify the quantity you need. This should be the # each, # of cases, etc., depending on the unit of issue.
5. **Part Number Field:** Provide the manufacturer and model number, ISBN #, Website or Catalog item, as applicable. Example: AVERY #24148
6. **Description Field:** Do not leave the default description, populated from the account code description. Delete the default and provide a detailed description of the item using all CAPITAL LETTERS. Include the item name, size, color, etc. Provide as much detail as possible. The description should start out with a general idea of what the item is, followed by additional detail.  
Example: MARKER, PERMANENT, JUMBO, CHISEL-TIP, BLACK, 12/BX  
If item has a deadline (i.e. in time for: promotion, school performance, assemblies/field trips), please indicate on the first line of the description when item needs to be received or the date of the event.
7. **Unit Price Field:** Enter the unit price (cost per each, per set, etc., depending on the unit of issue).
  - a. If price of item is unknown, indicate an estimated amount. If limited funds are available, please indicate in the internal notes section of the requisition. Please do not submit requisitions for zero dollars or one penny. Funding approval is required prior to placing an order. If "zero" is approved, it must be re-routed for approvals, resulting in further delays.
8. **Tax Field:** The system will enter the current El Cajon sales tax rate of 8.25%, by default. If it is a non-taxable item, you can delete it. Otherwise, leave the default tax as-is.
9. **Freight Field:** The system will enter the default rate of 10%, by default. If the order qualifies for free shipping, or you have information on the actual freight cost, you can adjust it. Otherwise, leave the default

as-is and Purchasing will adjust if needed.

10. **Notes Tab – Append Internal Notes Field:** Include any special instructions in the internal notes. Copy and paste in a website link to the product, if you have one. Please include vendor contact information (i.e. name, phone number or e-mail address) if you have it, especially for new vendors. If ordering furniture or equipment, include teacher name and room number or location for inventory purposes. If replacing an item, specify the District I.D. # that is being replaced. When ordering ink/toner cartridges or copier staples, include District I.D. # of printer or copier.
11. **Requisition Attachments:** Electronically attach any applicable information to your requisition (i.e., catalog page, printout from website, quote, copy of order form, picture, etc.)

### **SOFTWARE NON-MEDIA ORDERS**

For software non-media orders (website subscriptions), the receiving copy of the purchase order will be sent to the school site. Please check with the end user within a couple of weeks to see if they have received their log-in information, then sign and return the receiving copy of the purchase order to the Purchasing Department. Payment cannot be made until the receiving copy is returned.

### **ORDERS SHIPPED DIRECTLY TO SCHOOL SITE**

On orders that are shipping directly from the vendor to your school site, we will be sending a receiving copy of the purchase order to the school site. Upon receipt of the order, verify the order is complete, then sign and return the receiving copy of the purchase order, along with the pack slip to the Purchasing Department as authorization to pay.

### **REIMBURSEMENT REQUISITIONS**

1. Under the project field, indicate reimbursement.
2. Electronically attach all **SIGNED** receipts to requisition.
3. Original receipts must be kept at site for five years.

### **CONFIRMING REQUISITIONS**

1. In order to submit a confirming requisition, items must be received by site.
2. Under the project field, indicate confirming.
3. Electronically attach **APPROVED/SIGNED** invoice(s) to requisition.
4. Original invoices must be kept at site for five years

